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ABSTRACT

This is a catalog of behavioral objectives organized by units. Each unit contains an outline of the content, a goal statement, and general and specific objectives. The catalog contains a total of 48 units on: business behavior and psychology; business law; business math; business principles and organization; business terminology; communication and basic language skills; elements of fiscal records; introduction to office careers; money management; office machines, calculating, and duplicating; payroll records; receptionist-telephone training; recordkeeping; records management; secretarial procedures and practices; typewriting; correspondence and report writing; survey of data processing and special stenographic units. The purpose of each unit is three-fold: to provide a bank of objectives related to task analyses and job descriptions, to provide a bank of test items which could be used in statewide studies of program effectiveness, and to develop materials which could be used in the Behavioral Objectives Organized in a System for Teachers (BOOST) which is both a delivery system for objectives and a computer bank of test items associated with the objectives. (BP)

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Vocational Education Evaluation Project

Behavioral Objectives for Selected Units In Business Education

Richard K. Hill B. June Schmidt
Editors

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FOREWORD

The primary objective of the Vocational Education Evaluation Project is to develop a management information system for the planning and programming of vocational education. To facilitate the accomplishment of this objective, the work of the project has been divided into a macro-subsystem and a micro-subsystem. The macro-subsystem is primarily concerned with guidelines and systematic procedures at the state level, while the micro-subsystem is emphasizing the assessing, planning, and programming of individual vocational education programs in local schools.

Direct costs for this project were funded on a 90 percent reimbursement basis by the Division of Vocational Education, State Department of Education, Richmond, Virginia. These funds came from Part C of the Vocational Education Amendments of 1968. The remaining 10 percent of direct costs and all indirect costs were funded by the Research Division, Virginia Polytechnic Institute and State University. The Division of Educational Research and Statistics, State Department of Education, provided the data processing for the Vocational Education Reporting System.

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The units contained in this catalog were developed for use in the micro-subsystem. These materials are the products of an effort to develop a means of assessing the effectiveness of local instructional programs.

This publication is one in a series of publications of the Vocational Education Evaluation Project. The intent of this series is to inform educators in Virginia, as well as the nation, of the project's work.

Dewey A. Adams, Director
Division of Vocational and
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INTRODUCTION

WHAT IS IN THE CATALOG

This is a catalog of behavioral objectives organized by units. Each unit contains an outline of the content, a goal statement, and general and specific objectives.

The catalog contains a total of 48 units. Although they were written for teachers of the stenographic block, they should be of use to most business education teachers.

HOW THE UNITS WERE DEVELOPED

These units were developed during summer workshops conducted on the campu of Virginia Polytechnic Institute and State University during the summers of 1971-73. Business education teachers from throughout the Commonwealth participated. They received instruction on how to develop these materials and then wrote them in workshops. During the workshop, their work was supervised by Dr. Hill and Mrs. Schmidt. At the conclusion of the workshop, the materials were collected and edited by Mrs. Schmidt.

WHY THE UNITS WERE DEVELOPED

The original intent in writing the units was three-fold: to provide a bank of objectives which could be related to task analyses and job descriptions to provide a bank of test items which could be used in state-wide studies of program effectiveness, and to develop materials which could be used in BOOST (Behavioral Objectives Organized in a System for Teachers). There is an explanation of BOOST starting on page 6.

HOW TO USE THE CATALOG

How These Objectives Are Written And Organized

A set of behavioral objectives must be comprehensive and specific. It must be comprehensive for planning purposes because the exclusion of any objective might be critical. (For example, if a unit is written on good grooming and all the objectives that relate to understanding why good grooming is important are left off, it might as well not have been started. Surely, someone who understands "how" but not "why" is unlikely to exhibit the behavior desired when he is no longer restrained by the testing situation.) The objectives must be specific for evaluation purposes because reliable tests cannot be developed if the objectives which determine the questions to be constructed are subject to varying interpretations.

The way objectives typically are written is to attempt to develop one comprehensive set of specific objectives. This approach would yield a satisfactory solution if, in fact, it were possible to do. Since it usually is not, when they are asked to do it, most teachers encounter great frustration Their usual response is to develop a long list of objectives which require recall of the content to be presented, and little more. Of course, if they were asked if that list of objectives reflected their true intent, they would respond negatively. However, the construction of this first list takes so long that they usually stop there, having little time or desire to continue. This unsatisfactory situation need not continue. This current approach of writing objectives ignores the fact that there really is no need for a set of comprehensive objectives to be specific, nor for a set of specific objectives to be comprehensive. This will be explained in greater detail.

The objectives must be comprehensive for planning purposes. But teachers can plan their instruction at least as well from more general statements as they can from specific ones, and frequently even better. For planning purposes it should be permissible to use words such as "understand," "appreciate" and "comprehend." So long as the objectives are written so that teachers can communicate with each other with reasonable clarity, further specificity is not required.

The purpose of writing specific objectives is to have a starting point for the development of test questions. But a test is never comprehensive; therefore, there is no need for the specific objectives to be comprehensive either. They only must be representative.

This alternative approach to writing objectives was used in the development of this catalog. Each unit contains one set of objectives which is comprehensive and clear, but not specific, and then another set of objectives which is specific and representative, but not comprehensive. With this approach, the former set of objectives (called general objectives) is written first. The latter set is written by taking each general objective, and writing five to eight specific objectives for each. The specific objectives should cover as many different aspects of the general objective as possible. Their main purpose is to help define and add clarity to the general objective.

The reason for putting limits on the number of specific objectives to be written for each general objective is to help insure representativeness. It is easy to succumb to the temptation of writing a few specific objectives for some general objectives, and writing dozens of specific objectives for a general objective that covers a broad content base, but this practice leads to the development of a test which is unbalanced.

This method recognizes that teachers and evaluators have different reasons for writing objectives. (It is assumed here that the teacher and evaluator are two different people. Of course, it most commonly happens that the teacher changes hats and becomes his own evaluator, but we will make a distinction between these two for purposes of discussion.) A teacher needs to feel that his list of objectives is complete, because it may well be that the worth of a unit is lost if one major component is missing. An evaluator does not need such a complete list, because the measures he uses are always samples anyway. He needs only a representative sample.

HOW TO DEVELOP YOUR OWN UNIT

The first point to be emphasized is that the units are not written as someone's suggestion as to how you should teach your students. The material is organized into units simply because it will be much easier for you to locate the objectives you want to use. Therefore, do not consider this book to be some official guide which requires you to teach certain objectives when teaching the units listed herein.

The second point to be remembered is that you should use the general objectives to plan your teaching. Use the specific objectives only to help clarify what is meant by the general objective. Keep in mind that only a sample of specific objectives is given for each general objective. Do not consider this to be a comprehensive set of specific objectives. The philosophy under which these were written precludes the possibility of generating such a set.

To use this catalog in teaching, you might proceed in the following way:

1. Jot down a title for the unit you want to teach. Think about what your students will be doing on the job with the material you are going to present in class. If you can write a job-oriented goal statement like the ones in this catalog, go ahead and do so.

2. Turn to the table of contents of this catalog. Note any titles

of units which might have objectives related to your proposed unit.

3. Read those units, and then write down the general objectives that you can glean from them that are appropriate for your unit. You may be able to find objectives from several units that you can use in the one you are writing.

4. Review the set of general objectives to make sure they are complete. Remember, the general objectives must be comprehensive. Ask yourself if you have ever had a student who could succeed on all the objectives you have listed, but still failed on the job. If you can figure out why he failed, that should give you an idea for another objective. For example, suppose you are writing a unit on use of the telephone. You had a student who knew what to say and was very polite, yet her employer was dissatisfied because her voice sounded so immature on the phone that she could not use the phone effectively. With this information in mind, you should add a general objective that reads something like, "The student will develop a speaking voice which would sound authoritative." Of course, now you must help to define what you mean in this general objective by writing a sample of specific objectives which cover it as representatively as possible.

5. When you are satisfied that your general objectives are complete, (usually somewhere between 5 and 10 general objectives) develop your content to cover them.

6. Teach the unit.

7. When ready to develop a test, go back to the specific objectives listed under each general objective you decided to use. Develop a test item which will measure each one. For example, in the unit titled "Accounting Fundamentals," the first specific objective under general objective I is:

01. I.A.--Match terms with abbreviations.

One way to test whether or not the student can actually do this would be with the following test question:

1. Which of following lists correctly spells out these accounting abbreviations: Ck; R; Db; and C 12?

Check	Charge	Check	Check	Check
Receipt	Receipt	Receive	Receipt	Receipt
Decrease	Debit	Debit	Debit	Debit
Cash Journal	Charge Journal	Cash Journal	Chapter 12	Cash Journal
Page 12	Page 12			Page 12

That should be all there is to doing a whole unit. Of course, there is no need for this unit to be taught to a whole class. If you individualize your instruction, it might well be developed for only one student. But whether you do it for one student or for thirty, the time savings should be substantial, while you still have a unit which is yours alone, and written with your students and their needs in mind.

BOOST

BOOST (Behavioral Objectives Organized in a System for Teachers) is a delivery system for the objectives contained in this catalog and a computer bank of test items associated with the objectives. Rather than having teachers develop their own tests as explained above, the tests are generated for them. In the computer bank, there are several test items written to measure each general objective. A test is developed by selecting items from the pool which are related to any given set of objectives. A pilot project of BOOST is being conducted with stenographic block teachers of business education in Hampton, Richmond, and Prince William County during the spring of 1974.

Unit: EMPLOYER-EMPLOYEE RELATIONS

Outline of Unit

I. Initial Impression - Presenting an Image to the Employer

II. Employer Expectation - Company Rules, Etc.

III. Employer Responsibilities - What Employee Should Be Able to Expect from the Employer (Fair Salary, etc.)

IV. Employee Responsibilities - What the Employee Owes to the Employer in Exchange for His Earnings

V. Employer-Employee Communications

  A. Employee adjustment on-the-job (proper orientation)
  B. Attitudes and values of the company/employer
  C. Problem situations involving employer/fellow workers
  D. Interest in company, enthusiasm, ideas for improvement, etc.
  E. Possible employer reaction

VI. Employer/Management Problems and Goals

VII. Description of Good Employer-Employee Relations and How to Achieve Them

Goal Statement

The employee communicates with his employer (whether his immediate supervisor or other supervisors) and so defines his on-the-job role and responsibilities as well as those of his employer. He must use techniques that smooth out the difficulties that inevitably develop in work situations, and he must convey his needs and aspirations to his employer. The attitude he displays in the office situation should help him work harmoniously with his superiors and his fellow workers.

General and Specific Objectives

I. The student will recognize the importance of establishing a business-like image acceptable to the employer. Specifically the student will be able to:

  A. list the benefits of making a good first impression on the employer.
  B. list the consequences of not establishing a good first impression on the employer.
  C. given a situation where an employee shares confidential information with her fellow workers, the student will be able to predict employer reaction.
  D. given a list of unbusiness-like behavior for the office worker, predict the effect these actions would have on an employee's image to his employer.

  E. given examples of dress styles, decide the effect such dress would have on the employee's office image.
  F. given a situation whereby the employee does not observe personal hygiene, determine typical employer reaction.

II. The student will apply the techniques necessary for establishing a business-like image acceptable to the employer. Specifically the student will be able to:

  A. given a list of current dress, select those most appropriate for the office worker.
  B. list good grooming practices essential for the office worker.
  C. identify unbusiness-like actions on the part of the beginning employee.
  D. given descriptions of business-like and unbusiness-like behaviors, decide which falls under each of these two categories.
  E. predict the consequences of those behaviors listed in the unbusiness-like category.
  F. list attitudes present in most business offices which present stumbling blocks to the new employee.
  G. given a problem situation, state action he would take as an employee and give reasons to justify those actions.

III. The student will determine employer expectation. Specifically the student will be able to:

  A. given a list of those expectations generally found among employers, predict those of highest priority.
  B. list sources of information whereby an employee can determine employer expectations.
  C. given a list of typical employer expectations, state the reasoning behind such expectations.
  D. given a case situation in which three employees adjust in a different way to an employer's expectations select the employee that made the best adjustment.
  E. given a description of employer personality types, select probable employer expectations.

IV. The student will adjust to employer expectation. Specifically the student will be able to:

  A. describe universal or "unwritten" employer expectations that employees must observe.
  B. identify the benefits of the positive acceptance of employer expectations.
  C. predict the consequences of negative attitudes in adjusting to employer expectations.
  D. predict outcomes of actions in which an employee does not operate within "company" policy.
  E. given descriptions of employer personality types, select the probable adjustment employees must make.

V. The student will recognize the areas of employer responsibility. Specifically the student will be able to:

- A. describe benefits generally provided by employers.
- B. list responsibilities and/or obligations of an employer to his employees.
- C. given descriptions of employer rights and responsibilities, contrast these with employee rights and responsibilities.
- D. given a situation in which the employer does not meet his responsibilities, identify the "ways" in which the responsibilities are not met.
- E. given a situation in which the employer does not meet his responsibilities, identify techniques he can use to communicate the lack of responsibility on the part of the employer to the employee.

VI. The student will accept employee responsibility to the employer. Specifically the student will be able to:

- A. identify responsibilities of the office employer in terms of his office behavior.
- B. identify the office worker's responsibilities to the employer regarding his on-the-job proficiency.
- C. list reasons for maintaining a good community image.
- D. state reasons why an employee's community image is part of his responsibility to his employer.
- E. given case situations, predict the consequence of lack of employee responsibility on his relationship with his employer.
- F. given case situations in which the employee terminates his job in responsible or irresponsible ways, select the best ways of terminating a job.
- G. state the reasons why an employee should terminate a job in a responsible manner.

VII. The student will appreciate the goals and problems of management. Specifically the student will be able to:

- A. list typical concerns and problems of management.
- B. state the employee's role in causing the problems of management.
- C. define the employee's role in lessening or solving the problems of management.
- D. identify the necessity of the employer's making a profit in terms of the employee's job.
- E. list sources of information whereby a new employee could determine the goals of his employer.
- F. given case situations, the student will be able to predict the consequences of employee indifference to his employer's goals and problems.

VIII. The student will establish lines of communications with the employer for the exchange of information, sentiments, etc. Specifically the student will be able to:

A. list the reasons why communication is necessary for good employer-employee relations.
B. given problem situations involving fellow employees, identify advantages of direct employee-employer communication in order to best solve these problems.
C. given case situations in which the employee has various job-related problems, identify the advantages of enlisting his employer's aid in solving these problems.
D. given problem situations involving his immediate supervisor or other superiors, identify the advantages of direct employer-employee communication in making the employer aware of his concerns.
E. list ways an employee can communicate positive attitudes such as enthusiasm, desire for improvement, etc. to his employer.
F. list the consequences of poor employee-employer communications.

IX. The student will project the personality which encourages good employer-employee relations within the confines of the employee's own individuality. Specifically the student will be able to:

A. state the role played by the employee in promoting good employee-employer relations.
B. list desirable personality traits that foster good employer-employee relations.
C. identify what is meant by the term employee-employer relations.

Unit: HUMAN RELATIONS WITH FELLOW EMPLOYEES

Outline of Unit

I. Develop Your Personality

  A. Know yourself
    1. Self-analysis
    2. Good grooming
    3. Personal health
    4. Accept yourself
  B. Accept others

II. Develop Your Communication Skills

  A. Personal situations
  B. Business situations

III. Personal attitudes and their effect on proficiency

  A. Toward job
  B. Toward responsibility
  C. Toward others

Goal Statement

To succeed on the job, the office worker must possess human relation skills essential in getting along with others.

General and Specific Objectives

I. The student will understand basic personal traits. Specifically the student will be able to:

  A. list four (4) health habits.
  B. distinguish between good and poor health habits.
  C. list three (3) factors concerning emotional and mental health.
  D. differentiate between positive and negative emotions.
  E. select appropriate apparel for office.

II. The student will understand that co-workers are individuals. Specifically the student will be able to:

  A. list four (4) prerequisites for getting along with others.
  B. describe why office friends should be carefully selected.
  C. explain the need for conversational skill.
  D. know ten (10) easy lessons in conversation.
  E. describe three (3) phases of creative listening
  F. given a situation in which an office worker fails to listen creatively, identify the consequences.

III. The student will recognize that office workers work more effectively if they are cooperative. Specifically the student will be able to:

A. describe why cooperation is valuable.
B. differentiate between cooperation and doing someone else's job.
C. list problem areas which might impede cooperation.

IV. The student will understand their job in relation to the total efforts of the company. Specifically the student will be able to:

A. list seven (7) work habit areas.
B. define positive and negative work habits.
C. list four (4) areas that define what each employee must do to make the group effort successful.

Unit: HOLDING AND ADVANCING ON THE JOB

Outline of Unit

I. Desirable Personal Traits and Characteristics for Office Environment
  A. Personal grooming and dress
  B. Proper use of cosmetics
  C. Health habits
  D. Consideration for others

II. Human Relations
  A. Business-like relations with co-workers
  B. Interest in others
  C. Community relations

III. Work Habits and Attitudes
  A. Punctuality
  B. Regular attendance
  C. Responsibility
  D. Loyalty

IV. High Quality Work
  A. Accurate work
  B. Effect of accurate work on company efforts

V. Interest in Company
  A. Company policy
  B. Company policy as related to workers
  C. Company policy as related to community
  D. Company policy as related to other business firms

VI. Educational Opportunities
  A. Available institutions
  B. Available courses
  C. Career goals

Goal Statement

In order to hold and advance on the job, the office worker must display desirable personal qualifications, knowledges, and skills. He must perform his job in a manner that will enhance the total effort of the company. He must use public relations that have an advantageous effect on his own and his company's relationship to the community and he must constantly strive to increase his knowledge of company practices, policies, and procedures.

General and Specific Objectives

I. The student will understand the importance of personal traits and characteristics as related to an office environment. Specifically the student will be able to:

- A. differentiate between appropriate dress for the business office and dress for evening, beach, or school.
- B. given a choice of varying degrees of the application of cosmetics, select one most appropriate for office workers.
- C. identify daily health habits desirable for office workers.
- D. given character studies, point out these traits and characteristics which would be desirable.
- E. given undesirable office developments that have been direct results of inappropriate behavior, relate personal traits or characteristic changes necessary to correct the situation.

II. The student will realize the importance of effectively relating to fellow employees, employers, and the community. Specifically the student will be able to:

- A. demonstrate conversation with fellow employees showing friendliness.
- B. given a choice of personal reactions to office events, select the one that is the most business-like.
- C. given a choice of possible reactions to community requests, select those in keeping with company policy.

III. The student will understand work habits and attitudes that are in the best interest of the company. Specifically the student will be able to:

- A. state reasons it is important to be punctual.
- B. given a situation in which he is to act as the employer, explain to his employees why regular attendance is important to the company.
- C. given a list of office jobs to be done, select those that will require the assumption of added responsibilities in order to accomplish the task.
- D. given a choice of reactions, select ones that demonstrate loyalty to company.

IV. The student will develop an appreciation of the need for high quality in work performance. Specifically the student will be able to:

- A. given typical business correspondence, locate and correct all errors.
- B. type 5 pieces of mailable material.
- C. given invoices with errors, locate and correct errors.
- D. using the above invoices, state how the located error would:
  - (1) affect company finances
  - (2) affect company image with other companies
  - (3) cause filing errors
  - (4) cause company problems
  - (5) cause problems in human relations

V. The student will realize the importance of developing an interest in company activities and policies as related to the employees, other businesses, and the community. Specifically the student will be able to:

   A. discuss company employee policies.
   B. relate ways that company policies affect his personal life.
   C. evaluate these effects on his personal life.
   D. give examples of company policies that relate to other business.
   E. evaluate these policies according to his own moral code.
   F. discuss ways in which company policies affect the community as a whole.
   G. using conclusions reached in objectives A through F above, reach a decision as to whether or not he will pursue a career with this company.

VI. The student will recognize and take advantage of opportunities available to him which will make him a more valuable employee. Specifically the student will be able to:

   A. identify schools in the community that offer courses in his career area.
   B. list courses he needs to pursue in order to broaden his knowledges and skills.
   C. name a professional organization in which membership would be advantageous.
   D. list training classes offered by his company during the past two-year period.
   E. state projected career goals.
   F. select from listed available opportunities those necessary to achieve stated goal.

Unit: BUSINESS LAW
Parts I, II, III

Outline of Unit

- I. You and the Law
  - A. Law defined
  - B. Classification of laws
  - C. Classification of violations
  - D. Remedies for violations
    - 1. Injunction
    - 2. Lawsuit for damages
- II. Importance of Law to Business
  - A. Purpose of laws
  - B. Effects of legislation on business practices
- III. Common Legal Forms
  - A. Subpoena
  - B. Affidavit
  - C. Power of Attorney
  - D. Proxy
- IV. Contracts
  - A. The nature of a contract
  - B. Kinds of contracts
    - 1. Oral
    - 2. Written
    - 3. Express
    - 4. Implied
  - C. Required elements of a contract
    - 1. Mutual assent
    - 2. Competent parties
    - 3. Consideration
    - 4. Legal bargain
    - 5. Required form
  - D. Uniform commercial code

Goal Statement

The office worker or trainee must have a useable knowledge of legal terms, must know the effects that legislation has on business practices, and be able to recognize different legal forms coming into the office. Further, he must know the essential elements of contracts, the nature of contracts, and the different kinds of contracts that relate to a particular business, and he must be able to apply basic concepts of law to situations that he has to deal with on the job.

General and Specific Objectives

I. The student will know the terminology of the law. Specifically the student will be able to:

- A. define the term "business law."
- B. distinguish between a tort and a crime.
- C. identify differences among duress, negligence, and undue influence.
- D. distinguish between libel and slander.
- E. define fraud.
- F. identify differences among patent, copyright, and franchise.
- G. distinguish between a felony and a misdemeanor.
- H. identify differences among valid, void, and voidable.

II. The student will know the effects of legislation on business practices. Specifically the student will be able to:

- A. identify the purpose of the Uniform Commercial Code.
- B. identify those laws that directly affect business practices.
- C. describe the law that is concerned with man's obligation to his fellowman.
- D. state the purpose of private laws.
- E. identify purposes that govenment agencies serve in respect to laws that affect businesses.
- F. state the purpose of administrative laws.
- G. identify the purpose of statutes
- H. list the requirements for approval or ratification of an amendment to the Federal Constitution.
- I. state the purpose of the Fair-Trade Law.

III. The student will recognize the common legal forms. Specifically the student will be able to:

- A. state the purpose of a proxy.
- B. state the purpose of an affidavit.
- C. state the purpose of a subpoena.
- D. identify a power of attorney.

IV. The student will have a thorough knowledge of contracts. Specifically the student will be able to:

- A. select required elements of a contract.
- B. state the purpose of contracts.
- C. describe the different types of contracts.
- D. identify the usual remedy for the injured party if the other party breaches the contract for the sale of personal property.
- E. identify the means by which contracts are ordinarily discharged.
- F. distinguish the roles of the different people involved in making contracts.
- G. distinguish between an implied and express contract.
- H. list the contracts enforceable under the Statute of Frauds.
- I. state the purpose of the "oral evidence rule."

V. The student will recognize minor points of law applicable in various legal situations. Specifically the student will be able to:

A. determine the validity of an offer.
B. describe how the property of a person facing bankruptcy will be handled.
C. take examples of illegal acts and classify the type of wrongful act that applies to that particular case.
D. detect missing elements of a contract.
E. identify the correct means for terminating a particular contract.
F. indicate the legal effect of a given situation as being void, valid or voidable.
G. select the method for ending a particular offer.
H. take excerpts from newspaper stories relating to a crime, tort or both and identify which type of wrong is the subject of the story.
I. classify the type of law that applies to an illustrated case.
J. state the responsibility of a minor involved in a contract.

Unit: BUSINESS LAW
Parts IV, V, VI

Outline of Unit

I. Sales Transactions

- A. What constitutes a sales contract
- B. Transfer of title
    - 1. General rule for the transfer of title
        - a. Stolen goods
        - b. Lost goods
        - c. Mislaid goods
        - d. Abandoned goods
    - 2. When title passes
        - a. Sales with right of return
        - b. Sales on trial or approval
        - c. Auction sales
        - d. C.O.D. sales
- C. Law of sales
    - 1. Statute of Frauds
    - 2. Bulk Sales Act
- D. Warranties
    - 1. Expressed
    - 2. Implied
- E. Breach of sales contracts
    - 1. Remedies of the buyer
        - a. When the wrong quantity is delivered
        - b. When the goods are not as ordered
        - c. When the seller fails to deliver the goods
    - 2. Remedies of the seller
        - a. When the buyer refuses to accept delivery of the goods
        - b. When the buyer refuses to pay the purchase price
        - c. When the buyer is insolvent

II. Negotiable Instruments

- A. What makes a paper negotiable?
    - 1. Must be in writing, signed by maker
    - 2. Makes a promise
    - 3. Contains words of negotiability
    - 4. Is payable in money
    - 5. Designates time
    - 6. Bill of Exchange (must indicate drawee with reasonable certainty)
- B. Types and content
    - 1. Checks
    - 2. Certified checks
    - 3. Bad checks
    - 4. Forged checks
    - 5. Raised checks
    - 6. Post dated checks
    - 7. Stop payment

C. Promissory Notes

D. Drafts (Bill of Exchange)

E. Transfer
    1. Kinds of endorsements
        a. Blank
        b. Special
        c. Restrictive
        d. Qualified
        e. Conditional
        f. Waiver
    2. Responsibilities of endorser
        a. Paper is genuine
        b. Prior competent parties
        c. Holds good title to instrument
        d. Valid

III. Legal Relationships

A. Legal aspects of employer-employee relations
    1. Employer-employee
    2. Contracts of employment
        a. Oral
        b. Written
        c. Collective-bargaining

B. Laws concerning employment
    1. Workmen's compensation laws
    2. Minimum wage laws
    3. Social security laws
        a. Old-Age, Survivors and Disability Insurance
        b. Medicare
        c. Unemployment Insurance
        d. Public assistance
    4. Protection of minors

C. Credit for buyer and borrower
    1. Credit cards
    2. Lien
    3. Collateral

D. Secured Transactions

E. Landlord and tenant
    1. What is a lease
    2. Types of tenancy
        a. Tenancy for years
        b. Periodic tenancy
        c. Tenancy at sufferance
        d. Tenancy at will
    3. Rights and duties of a tenant
    4. Rights and duties of a landlord
    5. Termination of a lease

Goal Statement

The office worker or trainee must know the essential elements of sales transactions and negotiable instruments as they relate to a particular business, and he must understand the legal rights and obligations of parties to business agreements. He must be able to apply basic concepts of these phases of business law to the situations that he deals with on the job.

General and Specific Objectives

I. The student will know the essential elements of a sales transaction. Specifically the student will be able to:

   A. distinguish between a sales contract and a contract to sell.
   B. identify a "contract of sale" transaction.
   C. state the type of property sales that are covered under the Uniform Commercial Code.
   D. identify a barter transaction.
   E. distinguish between a gift and a mutual benefic bailment.
   F. state the difference between an express and an implied warranty.
   G. state the purpose of the Statute of Frauds as it applies to sales.
   H. identify when ownership and risk of loss passes to the buyer if goods are sold on approval.
   I. define a bill of sale.
   J. apply the rule of caveat emptor.

II. The student will have a working knowledge of the rules which govern the transfer of negotiable instruments. Specifically the student will be able to:

   A. identify four important types of negotiable instruments.
   B. distinguish between negotiable instruments and an ordinary contract.
   C. explain why a negotiable instrument is not effective until it is both written and delivered.
   D. list five ways a check differs from a draft.
   E. from a display of various negotiable instruments, identify the parties in each.
   F. explain the form and content requirements of a negotiable instrument.
   G. name several types of endorsements that may be used in the negotiation of credit instruments.

III. The student will understand the essential elements which govern the employer-employee relationship. Specifically the student will be able to:

   A. define the term "employer."
   B. state the terms of an employment agreement.
   C. identify the rights of an employee.
   D. list three rights of an employer.
   E. select a statement which best represents "an honest day's pay for an honest day's work."
   F. list three ways the employment contract may be terminated.

IV. The student will know the laws concerning employment. Specifically the student will be able to:

A. differentiate between the various social-security laws.
B. describe the Fair Labor Standards Act.
C. state the purposes of workmen's compensation laws.
D. describe child-labor laws.

V. The student will have a basic understanding of wise credit use. Specifically the student will be able to:

A. distinguish between debtor and creditor.
B. list ways to establish a good credit rating.
C. give examples of unsecured debts.

VI. The student will know the legal aspects of a landlord and tenant relationship. Specifically the student will be able to:

A. define the term "lease."
B. differentiate various types of tenancy.
C. describe the type of property that is involved in a landlord and tenant relationship.
D. identify the ways for terminating a lease.
E. identify the rights of a tenant.
F. define subletting.

Unit: BUSINESS MATH REVIEW

Outline of Unit

I. Addition

II. Subtraction

III. Multiplication

IV. Division

V. Decimals

VI. Percentage

VII. Reciprocals

VIII. Complements

IX. Discount and Net Amount

X. Finding Selling Price

Goal Statement

The office worker must be able to accurately and rapidly record, compute, and verify mathematical information and proficiently use different mathematical applications to carry out assignments.

General and Specific Objectives

I. The student will understand basic business math computational procedures. Specifically the student will be able to:

   A. read aloud a list of multiple digit integers containing decimals and/or fractions so that they can be understood.
   B. add two or more integers to find a sum.
   C. calculate the difference between two integers.
   D. calculate a credit or negative balance when subtracting a larger number from a smaller number.
   E. interchange the multiplier and multiplicand and obtain a correct product.
   F. determine the accuracy of the quotient by multiplying the quotient by the divisor.
   G. add proper fractions.
   H. multiply improper fractions.
   I. subtract complex fractions.

II. The student will comprehend correct use of decimals. Specifically the student will be able to:

A. divide a decimal by a whole number.
B. divide a decimal by a decimal.
C. divide a smaller whole number by a larger whole number.
D. use a short cut procedure to multiply a decimal by any multiple of ten.
E. mark off decimals in products.
F. divide a decimal or a whole number by 10 or a multiple of 10 by moving the decimal point to the left.
G. calculate the decimal equivalent of 2/3.

III. The student will comprehend how to solve percentage problems. Specifically the student will be able to:

A. change a fraction to a percent
B. change a decimal to a percent
C. find the percent of a number when the number and the percent rate are given.
D. find the reciprocal of a number.
E. calculate the complement of a number.
F. calculate an unknown number when given the percent by which a part of that number has been increased.
G. calculate an unknown number when given the percent of decrease of a part of that number.
H. calculate the percent of increase or decrease in sales between the current period and the previous period when both numbers are given.

IV. The student will understand how to find discounts. Specifically the student will be able to:

A. calculate the amount of discount by multiplying the gross amount by the percent of discount.
B. calculate the net amount by subtracting the amount of discount from the gross amount.
C. identify the equation which would give the correct answer for finding net amount when the amount of discount is not needed.
D. calculate net amount when given a chain discount.
E. compute the net decimal equivalent of a chain discount.
F. derive the net amount by multiplying the price times the net decimal equivalent.

V. The student will apply the correct method in finding percent mark-up. Specifically the student will be able to:

A. calculate what percent of mark-up is determined by the same method as percent of increase and decrease.
B. compute mark-up when given selling price and cost price.
C. divide the mark-up amount by the selling price to determine the percent of mark-up.
D. formulate the method of figuring mark-up in retail accounting.

VI. The student will understand how to find selling price amounts. Specifically the student will be able to:

A. formulate a base for the selling price.
B. derive the selling price when cost and the percent of mark-up are known.
C. compute the selling price when the cost and percent of discount are known.
D. calculate what percent cost is of selling price when percent of mark-up is known.
E. calculate the selling price when the cost price and the amount are known.

Unit: UNDERSTANDING THE AMERICAN BUSINESS SYSTEM

Outline of Unit

I. The Free Enterprise System

- A. Goals
- B. Basic features
- C. Specialization
- D. Interdependency
- E. National economic decisions

II. The Profit Motive

- A. Capital goods
- B. Risks involved
- C. Management Expenses
- D. Net profit vs. pure profit

III. Competition

- A. Price competition
- B. Non-price competition
  - 1. Increased efficiency
  - 2. Conservation of resources
- C. Benefits to society

Goal Statement

The secretary, to be an effective citizen, consumer, and worker, must understand the American business system.

General and Specific Objectives

I. The student will know the unique characteristics of the free enterprise system. Specifically the student will be able to:

- A. list the basic features of the free enterprise system.
- B. cite the characteristics of different types of markets.
- C. define a market system.
- D. compare the classes of businesses.
- E. explain the limitations nations face in the production of goods.
- F. state the prerequisite conditions for a market to exist.
- G. explain the relationship between availability of products and prices.
- H. state the kinds of economic resources.

II. The student will understand the goals of a free enterprise system. Specifically the student will be able to:

- A. list the primary goals of the American economy.
- B. identify supplementary goals of a free enterprise system
- C. explain the interdependency of all parts of the free enterprise system.
- D. describe methods by which expansion can be achieved.
- E. select a statement or paragraph that best describes the meeting of a free enterprise system's goal.

III. The student will comprehend the importance of the profit motive in the free enterprise system. Specifically the student will be able to:

A. define profit.
B. state reasons why the owner is entitled to a profit.
C. evaluate the relationship between efficiency and profit.
D. define capital goods.
E. explain the difference between pure profit and net profit.
F. state reasons why an individual would organize a business.

IV. The student will appreciate the benefits of the free enterprise system to the individual and to society. Specifically the student will be able to:

A. identify advantages accrued to the consumer in a free enterprise system.
B. list the rights of the individual in a free enterprise system.
C. explain the common economic decisions each nation must make.
D. state the characteristics of a high standard of living.
E. list values accrued to society as a whole from a free enterprise system.
F. contrast the economic life of an individual living in a free enterprise system nation with that of one living in a government controlled system nation.

V. The student will understand the importance of competition in a free enterprise system. Specifically the student will be able to:

A. explain the basic types of competition.
B. list the characteristics of pure competition.
C. define a monopoly and an oligopoly.
D. give examples of monopolies.
E. differentiate between a pure monopoly and a natural monopoly.
F. explain conditions which create a favorable climate for monopolies.
G. define competition.
H. list ways in which businesses may compete.
I. explain how competition regulates profits and prices.
J. describe how society benefits from competition.

VI. The student will know the importance of small businesses in our economy. Specifically the student will be able to:

A. list the advantages and disadvantages of small business ownership.
B. explain why so many small businesses fail.
C. identify values of small businesses in our economy.
D. contrast small business ownership with large business ownership.
E. list types of businesses that are usually small in size.
F. explain what determines the categorization of a business as small.
G. select characteristics common among all types of businesses in the United States.
H. list the advantages of specialization of business.
I. explain the interdependency of most businesses.

Unit: PRINCIPLES OF MANAGEMENT

Outline of Unit

I. Overall Responsibilities of Management

II. Organization of Management

III. Patterns of Operation

- A. Planning
- B. Organizing
- C. Staffing
- D. Directing
- E. Controlling

Goal Statement

To be an effective member of the business community, the office worker must be aware of management's role in the American business systems.

General and Specific Objectives

I. The student will understand management's role in the business organization. Specifically the student will be able to:

- A. select reasons for business failure.
- B. state characteristics of good management.
- C. define management.
- D. list leadership qualities essential for good management.

II. The student will know the types of organizations in the American business system. Specifically the student will be able to:

- A. list they types of business organizations.
- B. state the advantages of a proprietorship.
- C. select the characteristics of a corporation.
- D. list the disadvantages of a partnership.
- E. define the types of business organizations.

III. The student will understand the general patterns of an organization's operations. Specifically the student will be able to:

- A. state the disadvantages of short-range planning.
- B. list the advantages of long-range planning.
- C. select the factors that improve staffing.
- D. label an organizational chart.
- E. identify the advantages of organizational charts.

IV. The student will understand management's objectives. Specifically the student will be able to:

   A. cite objectives of management.
   B. state why it is necessary to have objectives in management.
   C. list reasons for various management objectives.

V. The student will recognize good management qualities. Specifically the student will be able to:

   A. select the qualities of good management.
   B. state the qualities needed in good management.
   C. list qualities needed to be a good manager.
   D. differentiate between good and bad leadership qualities.
   E. list the characteristics of a good manager.

Unit: PERSONNEL AND HUMAN RELATIONS

Outline of Unit

I. Office Organization and Management

   A. Basic types of office organizations
   B. Areas of office activities

II. Personnel Policies

   A. Recruitment and selection of office workers
   B. Training and orientation
   C. Employee incentives
      1. Financial
      2. Non-financial
   D. Executive and departmental responsibility

III. Human Relations

   A. Supervisory responsibility
   B. Employer-employee relations

Goal Statement

The office worker must be aware of the basic organizational structure of an office as generally found in American businesses, as well as some of the factors involved in the management process. He must consider factors that affect the hiring of new employees by a company, the types of training and orientation programs generally provided, and the types of work incentives available. By utilizing his knowledge about the chain of responsibility, he can better assess his role in achieving goals that are mutual to him and his organization.

General and Specific Objectives

I. The student will be able to understand the basics of office organization and management. Specifically the student will be able to:

   A. identify the main areas of office activities.
   B. distinguish between the centralized and decentralized type of office organization.
   C. select a statement which best describes the combination centralized-decentralized office organization.
   D. select a statement which best states the purpose of an office organization chart.
   E. given a list of words related to office management, match them to the appropriate definitions.
   F. given a list of statements, select the one that best expresses the duties and responsibilities of the office manager.
   G. describe the job functions of the various clerical workers in the office organization.
   H. determine ways to bring about effective control of office supplies.
   I. given a list of statements, evaluate which would be of prime consideration in the selection of office layout and location.
   J. from a list of organizational activities, select those which usually fall under the responsibility of the personnel department.

II. The student will know the factors upon which the decisions for the recruitment and selection of office workers are usually based. Specifically the student will be able to:

A. define the terms related to personnel management.
B. determine the means that personnel departments most often use in seeking new employees.
C. determine the routine generally used by the personnel department to fill a recently vacant position.
D. from various statements, select ones that would not necessarily furnish important information about an employee. (or determine factors that an employer was to judge a prospective employee in the initial stages of the job interview.)
E. identify the person (or persons) who generally make final employment decisions.

III. The student will know the types of training and orientation programs usually provided for the office worker. Specifically the student will be able to:

A. identify why companies invest in training programs.
B. distinguish among the various types of training programs provided by employers.
C. state the advantages and disadvantages of on-the-job training.
D. determine kinds of information that should be included in orientation training.
E. evaluate employer responsibilities for employee training.

IV. The student will be aware of incentives generally offered to the office worker. Specifically the student will be able to:

A. differentiate among the basic types of employee incentives.
B. state the factors generally considered in determining wages for a certain geographical area.
C. determine the steps normally taken by a company seeking to establish a wage scale.
D. select factors generally considered when rating jobs within a company.
E. list incentives classified as "fringe benefits."

V. The student will recognize the areas of responsibility for promoting good human relations on the executive, supervisory, and office worker levels. Specifically the student will be able to:

A. identify accepted areas of executive responsibility.
B. identify accepted areas of supervisory responsibility.
C. identify ways a company can assess employee morals.
D. identify the responsibilities of the office worker in promoting good employer-employee relations.
E. define terms relating to labor-management relations.

Unit: FINANCIAL MANAGEMENT

Outline of Unit

I. Financial Requirements of a Business

  A. Capital needs in business
  B. Banking and financial problems

II. Research for Planning and Financial Decision Making

  A. Demand for the company's product
  B. Pricing of the product
  C. Supply of raw materials
  D. Actions of competitors
  E. Relations with the union
  F. General level of business activity

III. Areas of Financial Management

  A. Financial accounting
  B. Budgeting
  C. Taxes and their impact on business
  D. Risks and insurance
  E. Credit and collections

Goal Statement

Today's office employee must understand the importance of financial management to any business concern. He must realize how a business is financed and how financial decisions are made. The office employee must be able to work within areas of financial management.

General and Specific Objectives

I. The student will know about capital needs in the operation of a business. Specifically the student will be able to:

  A. determine basic capital needs for buying a business.
  B. identify the different kinds of proprietary capital.
  C. list the types of borrowed capital.

II. The student will be aware of basic banking and financial problems. Specifically the student will be able to:

  A. select a responsible bank.
  B. identify types of banks and their functions.
  C. determine regulations and requirements for obtaining loans.
  D. list different types of loans.
  E. describe interest rates used in loans.
  F. distinguish among methods of loan repayment.

III. The student will realize that negotiable instruments are involved in financial management. Specifically the student will be able to:

A. explain a promissory note.
B. write checks.
C. identify information contained on a certified check.
D. identify information contained on a bank draft.
E. identify information found on a cashier's check.
F. use the three types of endorsements.
G. explain how a bank money order is written.

IV. The student will know that decision making is an important aspect of running a business. Specifically the student will be able to:

A. identify the different types of research used to make intelligent decisions in business.
B. relate how the scientific method can be used in decision making.
C. identify areas of research used in decision making.

V. The student will be aware that financial accounting is essential to the functioning of a business. Specifically the student will be able to:

A. explain the two types of record systems.
B. use the cash method of accounting.
C. determine the part debt records play in business.
D. explain the role of depreciation records in business.
E. use register records in business.
F. explain why income tax records are kept.
G. explain how withholding tax records are kept.
H. determine how to keep social security tax records.
I. expalin how payroll records are kept.

VI. The student will understand that budgeting plays an important part in the control of a business. Specifically the student will be able to:

A. explain what is contained in a sales budget.
B. identify the use of merchandising and purchasing budgets.
C. identify the use of an advertising budget.
D. explain the role of the cash budget in the operation of the business.
E. describe the information contained in an income and expense budget.
F. discuss procedures involved in following a budget in business.

VII. The student will comprehend that a business has a certain amount of risks and needs insurance. Specifically the student will be able to:

A. list the two general types of insurance companies.
B. explain the use of fire insurance.
C. identify the purpose of transportation and cargo insurance.
D. identify the types of automobile insurance.
E. define burglary and robbery insurance and its use.
F. identify the different types of fidelity bonds.
G. explain the use of performance or surety bonds.
H. determine the need for liability insurance.
I. explain the need for life insurance on owners and executives in business.
J. identify the type of insurance usually carried on employees.

VIII. The student will recognize the place of credit and collections in the upkeep of a business. Specifically the student will be able to:

A. explain the two types of credit.
B. identify the procedures used in the collection of bills by a business.
C. determine the collection limitations usually observed in business.

Unit: GOVERNMENT AND BUSINESS

Outline of Unit

I. Economic Functions of Government

   A. Protect individual and property rights
   B. Prevent Abuses and Inequities
   C. Promote competition
   D. Promote general welfare
   E. Stabilize business conditions

II. Economic Tools of Government

   A. Power to tax
   B. Mandate to spend
   C. Stabilization policies

III. Responsibilities of Government

   A. Keep the economy working
   B. Protect the public interest

IV. How Government Regulates Business

V. How Government Helps Business

Goal Statement

The office worker, to be an effective employee, must be familiar with the government's role in a free enterprise system.

General and Specific Objectives

I. The student will understand the role of the government in a free enterprise system. Specifically the student will be able to:

   A. explain the consumer and producer functions of government, especially the economic effects of each on society.
   B. define laissez-faire.
   C. list the primary economic functions of government.
   D. define public sector.
   E. contrast the role of government in a free enterprise system with that of government in a planned economy system.

II. The student will know the economic tools of the government in a free enterprise system. Specifically the student will be able to:

   A. define subsidy.
   B. defend the granting of subsidies by a government.
   C. identify the economic tools of government.
   D. explain "mandate to spend."
   E. identify types of subsidized businesses.
   F. analyze how the increasing of taxes or interest rates affects the economic condition of the country.
   G. distinguish differences between a federal bank and a state bank.

III. The student will appreciate the government in a free enterprise system. Specifically the student will be able to:

- A. explain why minimum-wage laws are desirable.
- B. list provisions of minimum-wage laws.
- C. analyze desirable outcomes from an increase in minimum wages.
- D. identify ways in which the government may stimulate the economy.
- E. list methods by which the government prohibits or controls harmful products.
- F. explain how the government establishes quality standards.
- G. define eminent domain.

IV. The student will understand how the government regulates businesses in a free enterprise system. Specifically the student will be able to:

- A. list areas in which the government regulates business.
- B. name four government regulatory agencies.
- C. explain the functions of major government regulatory agencies--FTC, SEC, ICC, FDA, Bureau of Standards, FCC, Federal Reserve System
- D. define franchise.
- E. list types of franchised businesses.
- F. explain why government-owned enterprises are monopolies.
- G. define copyright.
- H. define patent.
- I. define trademark.

V. The student will understand how the government helps businesses in a free enterprise system. Specifically the student will be able to:

- A. identify reasons for anti-trust laws.
- B. discuss how government tries to prevent depressions.
- C. list ways in which government regulates public utilities.
- D. identify types of businesses that are public utilities.
- E. select ways in which government enforces contracts.
- F. identify public goods.
- G. list means by which the government collects information.
- H. explain how government-collected information aids businesses.

Unit: MARKETING AND MERCHANDISING MANAGEMENT

Outline of Unit

I. Study of the Market

   A. Importance and growth
   B. Factors affecting marketing activities

II. Channels of Distribution

   A. Distribution of goods from producer to consumer
   B. Factors involved in choosing a trade channel

III. Marketing Activities

   A. Buying
   B. Pricing
   C. Selling

IV. Merchandising Activities

   A. Promotion-advertising and display
   B. Delivery and shipping

Goal Statement

The office worker must understand and be able to apply a knowledge of the marketing process. He must know the factors that affect the sale of goods as well as the techniques used to influence the consumer to buy them.

General and Specific Objectives

I. The student will understand marketing factors that affect sales. Specifically the student will be able to:

   A. identify the various types of goods.
   B. identify factors that influence population trends.
   C. determine the effect consumer income has on the market.
   D. determine the effect that the geographical location of a business has on merchandising.
   E. give examples of the ways that style, fashion, and fad influence what people buy.

II. The student will analyze the factors involved in the distribution process. Specifically the student will be able to:

   A. distinguish among the various methods of distribution.
   B. identify the most common types of retailers.
   C. analyze the factors considered in choosing a channel of distribution.

III. The student will know the basic aspects of marketing activities. Specifically the student will be able to:

A. determine the basic factors to be considered in the buying of goods.
B. describe the planning of a purchasing organization.
C. describe the stock control of goods.
D. identify those considerations which ultimately determine the price.
E. describe the various techniques used by businesses to promote sales.
F. explain how the customer relations policies affect sales.

IV. The student will comprehend the basic principles involved in merchandising activities. Specifically the student will be able to:

A. describe the major forms of sales promotion.
B. identify the factors considered in the planning of an advertising program.
C. describe the methods used for assessing the effectiveness of advertising.
D. identify the characteristics of good advertising copy.
E. analyze how the display of goods affects sales.
F. explain the reasons why a business provides a delivery service.
G. identify the factors to be considered in choosing a method of delivery.
H. describe the duties and responsibilities of a traffic manager.

Unit: TYPES OF BUSINESS ORGANIZATIONS

Outline of Unit

I. Types of Business Organizations

II. Advantages of Different Business Organization Structures

III. Disadvantages of Different Business Organization Structures

IV. Responsibility of a Partner

V. Purpose of Special Organizations

VI. Terms Associated with Business Organizations

Goal Statement

The student upon entering the business world must seek employment in or operate the type of organization that best suits his personal needs. Once employed by self or others, he must identify and select business procedures advantageous to this type organization.

General and Specific Objectives

I. The student will know the names of various types of business organizations. Specifically the student will be able to:

  A. list the types of business organizations.
  B. identify types of business organizations from a given list.

II. The student will recognize the advantages of the various types of business organizations from the viewpoint of business. Specifically the student will be able to:

  A. list the advantages.
  B. describe the advantages.
  C. match the advantages with the type of organization to which it applies, given a list of advantages and types of organizations.
  D. distinguish among the advantages of a sole proprietorship, partnership, and corporation.
  E. explain why articles of co-partnership and a corporation charter are needed.

III. The student will recognize the disadvantages of the various types of business organizations from the viewpoint of business. Specifically the student will be able to:

  A. list the disadvantages of each type of organization.
  B. describe the disadvantages of each type.
  C. given a list of disadvantages and of organizations, match the disadvantages with type of organization to which it applies.
  D. choose a type of organization and identify reasons why it is disadvantageous to business.

IV. The student will recognize the various types of business organizations from the viewpoint of the employee. Specifically the student will be able to:

- A. list the advantages of the sole proprietorship, partnership, and corporation.
- B. explain why articles of co-partnership are an advantage to all partners.
- C. choose a type of organization and identify reasons why it would be advantageous to you as an employee.
- D. explain how the death of a shareholder would affect a corporation.
- E. explain the advantages of the sole proprietorship, partnership, and corporation.

V. The student will recognize the disadvantages of the various types of business organizations from the viewpoint of the employee. Specifically the student will be able to:

- A. list the disadvantages to the employee in each type of organization.
- B. explain the disadvantages of each type of organization.
- C. choose a type of organization and give reasons why it would be disadvantageous to you as an employee.
- D. given a list of disadvantages, indicate which applies to a sole partnership, proprietorship, or corporation.

VI. The student will appreciate the responsibility of a partner. Specifically the student will be able to:

- A. from the articles of co-partnership, distinguish the articles that are financially significant to the partners.
- B. list some investments that a partner makes in addition to money.
- C. explain why each partner is bound financially to the other.
- D. explain how the death of one partner affects the organization.

VII. The student will understand the purpose of special business organizations such as cooperatives and mutual companies. Specifically the student will be able to:

- A. explain the characteristics of a cooperative.
- B. list the purpose of a cooperative.
- C. list the characteristics of a mutual company.
- D. explain why members of a cooperative receive a limited return on capital investments.

VIII. The student will know business organization terminology. Specifically the student will be able to:

- A. define the terms.
- B. match the terms with a list of definitions.
- C. given statements pertaining to the terms, indicate the term that applies to the statements.
- D. compose sentences using the terms.
- E. match the terms with the types of organization to which they apply.
- F. given a list of definitions, indicate the word that it defines.

Unit: REVIEW OF BASIC ENGLISH SKILLS FOR THE CLERICAL ACCOUNTING, CLERK TYPIST, AND STENOGRAPHIC BLOCK

Outline of Unit

I. Basic Language Skills--Word Usage and Grammar Review

- A. The sentence
- B. Kinds of Sentences
- C. Classification of sentences
- D. Nouns
- E. Verbs
- F. Pronouns
- G. Subject and predicate
- H. Adverbs
- I. Adjectives
- J. Prepositions

II. Reinforcement of Basic Elements of Punctuation in Business Forms

- A. Punctuation marks
  - 1. Period
  - 2. Comma
  - 3. Question mark
  - 4. Semicolon
  - 5. Exclamation point
  - 6. Colon
  - 7. Parentheses
  - 8. Apostrophe
  - 9. Quotation marks
  - 10. Expression of numbers
- B. Punctuation styles used for business letters
- C. Capitalization needed for business correspondence

III. Understanding Quality and Performance Standards

- A. Neatness
- B. Format and layout
- C. Orderly arrangement of correspondence

IV. Handling Correspondence

- A. Corrections on business correspondence
- B. Preparing business correspondence
  - 1. Memorandum
  - 2. Informal reports
  - 3. Letters of application, reservations, thank-you letters, collection and application letters

V. Reinforcement of Vocabulary Skills

   A. Vocabulary
   B. Spelling
   C. Word division
   D. Use of troublesome verbs
   E. Word usage

Goal Statement

The office worker must use correct English, spelling and punctuation for success on the job. The office worker also needs to exercise good judgment and to be proficient in the handling of business correspondence.

General and Specific Objectives

I. The student will understand correct grammar and word usage. Specifically the student will be able to:

   A. given a list of alternatives, select the best description of different types of sentences.
   B. given a list of definitions, correctly classify sentences according to structure.
   C. given a list of parts of speech, identify the correct definition of each term.

II. The student will understand correct punctuation and use punctuation correctly. Specifically the student will be able to:

   A. given a group of sentences, punctuate them correctly.
   B. given examples of business letters, identify proper punctuation.
   C. given a group of sentences, distinguish between correct and incorrect forms of capitalization.
   D. given a group of sentences containing proper nouns, proper adjectives and important events, supply the necessary capitalization.

III. The student will understand the importance of grammatically correct business correspondence. Specifically the student will be able to:

   A. given a set of instructions, compose at the typewriter a letter of application using correct English.
   B. select the most appropriate definition of a collection letter.
   C. given a letter with typographical errors, correct the errors.
   D. given a situation in which the secretary sends letters with grammatical errors, identify reactions of customers receiving letters.
   E. given a situation in which the secretary frequently fails to proofread letters and does not correct errors, distinguish the consequence of such an attitude to the company.
   F. given a list of correctly and incorrectly spelled words, select the correct spelling of the words.

IV. The student will know how to correct grammatical errors in business correspondence. Specifically the student will know how to:

   A. identify proper grammatical construction by correcting errors in sentences.
   B. given a group of sentences, retype the sentences containing punctuation errors making proper corrections.
   C. given an example of a business letter in rough draft form, identify the correct way to set up the letter.

V. The student will recognize the importance of effective communication skills in business correspondence. Specifically the student will be able to:

   A. given a list of words pertaining to business terminology, define the words.
   B. given a list of selected words, indicate the proper division of the words.
   C. given sentences containing troublesome verbs, choose the correct or most appropriate verb form.
   D. given a group of sentences correctly and incorrectly structured, choose the most appropriate sentences with respect to grammar and word usage for a formal report or letter.

Unit: ACCOUNTING

Outline of Unit

I. Starting a Bookkeeping System

   A. Common bookkeeping practices
   B. The bookkeeping equation
   C. Accounting terminology

II. Recording Business Transactions

   A. Recording the opening entry
      1. Source document (balance sheet)
      2. The general journal
      3. Steps in recording the entry
      4. Proof of accuracy
   B. Analyzing business transactions involving:
      1. Asset accounts
      2. Liability accounts
      3. Proprietorship accounts
      4. Income accounts
      5. Expense accounts
   C. Journalizing business transactions
      1. Double-entry bookkeeping
      2. The cash journal and its advantages
      3. Source documents (receipts and check stub)
      4. Kinds of transactions recorded in the cash journal
      5. End-of-the-month work

III. Posting to the Ledger

   A. Posting the opening entry
      1. Introduction of the ledger
      2. Steps in posting the entry
   B. Posting from the cash journal
      1. Posting the general columns
      2. Posting the special columns

IV. Proving the Accuracy of Posting

   A. Proving the accuracy of the cash account
   B. Proving the accuracy of the ledger
   C. Finding and correcting errors

V. Appreciating the need for accurate, systematic records

Goal Statement

The accounting clerk must prepare and maintain elementary records of financial transactions. He also must relate and adapt his knowledge of bookkeeping to various office systems and procedures for recording financial activities.

General and Specific Objectives

I. The student will understand the terminology of elementary accounting. Specifically the student will be able to:

  A. match terms with definitions.
  B. convert accounting abbreviations.
  C. define bookkeeping terms.
  D. identify accounting processes.

II. The student will use bookkeeping principles to record business transactions. Specifically the student will be able to:

  A. interpret source documents.
  B. match items to be recorded with parts of the journal form.
  C. demonstrate the correct way to record an opening entry.
  D. use the bookkeeping equation to determine the net worth of a business.
  E. identify the characteristics of the debit and credit sides of the balance sheet, income, and expense accounts.
  F. classify accounts.
  G. record information on the journal form for a given transaction.
  H. separate a transaction into its debit and credit parts.

III. The student will use posting procedures to update the accounting records. Specifically the student will be able to:

  A. prepare a chart of accounts.
  B. list the steps in posting items of the opening entry.
  C. correctly post from the general journal to the ledger accounts.
  D. post the columns and totals of the cash journal.
  E. use check marks correctly when posting.

IV. The student will prove the accuracy of the accounting records. Specifically the student will be able to:

  A. prove the equality of debits and credits in the cash journal.
  B. prove cash by balancing the amount of cash on hand with the bookkeeping records.
  C. foot the accounts in the ledger.
  D. compute the balance of accounts in the ledger.
  E. prepare a trial balance.
  F. find errors when a trial balance does not balance.

V. The student will appreciate the need for accurate, legible and systematic accounting records. Specifically the student will be able to:

  A. use standard bookkeeping procedure when correcting an error in writing an amount.
  B. use standard bookkeeping procedure when writing in ruled columns of bookkeeping paper.
  C. list the steps of the accounting cycle.
  D. recognize the advantages of the accounting cycle.

Unit: CASHIER RECORDS AND PETTY CASH

Outline of Unit

I. Receipt of Money

- A. In person or by mail
- B. Preparation of forms
- C. Accurately calculate and make change
- D. Aware of counterfeit money
- E. Determine balance due
- F. Operate cash register

II. Recording of Cash Receipts

- A. Receipt book with stubs
- B. Receipt book with duplicate copies

III. Cashier Daily Reports

- A. Proof of cash
- B. Summary of sales for day
- C. Cash register audit
- D. Collection book records

IV. Posting to Customer Accounts

- A. Tabulate balance due
- B. Verify extensions

V. Petty Cash Fund

- A. Need for establishing
- B. How to replenish
- C. Safety in keeping of money

VI. Make Payments

- A. Write checks
- B. Make deposits

Goal Statement

The cashier must understand the correct procedures for and the importance of receiving payments made by customers in person or by mail. The employee must also possess a workable knowledge of how to write checks, keep accurate cash records, and make necessary small payments from the petty cash fund. These things must be done accurately and efficiently for the effective control of the financial transactions fo the office.

General and Specific Objectives

I. The student will have a knowledge of the application of cash records. Specifically the student will be able to:

   A. systematically prepare forms for incoming cash.
   B. record check stubs correctly.
   C. record checks legibly.
   D. compute extensions.
   E. determine balance due on customer accounts.

II. The student should accept payments from customers in person or by mail. Specifically the student will be able to:

   A. count money by denomination.
   B. make change rapidly in proper sequence.
   C. recognize counterfeit money.
   D. write legible receipts: (1) stub (2) duplicate.
   E. evaluate checks received by mail.
   F. compare customer's bill with amount received.

III. The student can perform correct procedures in change making. Specifically the student will be able to:

   A. quote amount of purchase and money received from customer.
   B. list reasons for not immediately placing cash in drawer.
   C. depress correct amount and department identification keys on register.
   D. make change with fewest possible pieces.
   E. explain importance of returning change to customer beginning with amount of sale.
   F. list reasons for being courteous toward customer.

IV. The student will understand the importance for balance of funds in cash drawer at all times. Specifically the student will be able to:

   A. prove cash by counting each denomination in cash drawer.
   B. list the number of checks on cash-proof form.
   C. record the total receipts and vouchers for cash paid out.
   D. subtract the amount of change on hand at beginning of day.
   E. verify totals with those on detailed audit strip from register.

V. The student will demonstrate effective record keeping in posting to collection books. Specifically the student will be able to:

   A. locate names listed in alphabetic order.
   B. post amount received to the credit column.
   C. subtract payment received in order to find balance due.

VI. The student will appreciate the need of establishing petty cash fund. Specifically the student will be able to:

   A. understand why one person is responsible for making all petty cash payments.
   B. list reasons for establishing the fund.
   C. prepare summary of petty cash expenditures.

Unit: APPLYING FOR A JOB

Outline of Unit

I. Discovery of Jobs Available

  A. Personal acquaintance
  B. Employment agencies
  C. Newspaper advertisements
  D. Direct communication with a possible employer

II. Preparation of Job Qualifications

  A. Writing a letter of application
  B. Developing a personal data sheet
  C. Compiling a letter asking permission of references used

III. Preparing for the Personal Interview

  A. Appropriate dress
  B. Correct manners
  C. Achieving suitable mental attitude

IV. Actual Interview

  A. Being on time
  B. Having poise and being alert
  C. Answering questions
  D. Discussion of various questions if needed
  E. Asking for information from interviewer
    1. Job responsibilities
    2. Opportunities for advancement
    3. Raises
    4. Salaries
    5. Fringe benefits
  F. Forming a favorable impression on interviewer
    1. Looking at him when answering questions
    2. Paying close attention
    3. Knowing when interview is finished
  G. Ready to take a performance test if requested to do so

V. Follow-up of Interview

  A. Writing a letter thanking interviewer for his time
  B. Decision whether to accept job if offered

Goal Statement

The successful job applicant must understand the steps involved in job application. He knows and follows the necessary procedures in preparation for a job interview, during the interview, and after the interview. He relates available jobs to his own personal needs and ambitions.

General and Specific Objectives

I. The student will know what steps are involved in job application. Specifically the student will be able to:

   A. list the steps involved in applying for a job.
   B. identify the tasks needed in each of the steps in employment.
   C. describe the purpose of each of the steps in job application.

II. The student will comprehend the need for personal assessment of job capabilities. Specifically the student will be able to:

   A. given a job application situation, the student will be able to list the skills he can perform.
   B. given a job application situation, the student will be able to describe to what degree of competency and accuracy he can carry out the skills.
   C. given a case study, the student will be able to evaluate what characteristics make up a desirable office personality.

III. The student will prepare personal qualifications forms needed for job application. Specifically the student will be able to:

   A. given a case study, the student will know what should be covered in a letter of application.
   B. the student will be able to write a letter of application.
   C. given a case study, the student will be able to know if the appropriate people have been selected for references.
   D. given examples, the student will be able to select people who will know his qualifications for employment.
   E. given a situation, the student will be able to write a letter asking permission to use people selected as references.
   F. the student will be able to compose a personal data sheet.

IV. The student will understand and appreciate the purpose of preparing for an interview. Specifically the student will be able to:

   A. given a case study, the student will be able to identify benefits of preparing for an interview.
   B. given a case study, the student will be able to explain what appropriate dress should consist of for an interview.
   C. given a selection, the student will be able to select what qualities display good manners during an interview.
   D. given examples, the student will be able to select positive attitudes about employment.
   E. given a choice, the student will be able to identify what materials should be taken to the interview for use in a possible employment test.
   F. given a case study, the student will be able to determine what constitutes good standing in a company.
   G. given a situation, the student will be able to determine where to get information on his interviewer.
   H. given a situation, the student will be able to know what to ask his interviewer before he has the actual interview.

V. The student will demonstrate his capability for employment during a mock interview. Specifically the student will be able to:

   A. given a case study, the student will select the person who arrives on time for the interview, perhaps a few minutes early.
   B. given a case situation, the student will be able to select the interviewee who looks directly at his interviewer showing him that he has his undivided attention.
   C. the student will be able to sit erect during the interview.
   D. given a job situation, the student will be able to use proper English when speaking to the interviewer.
   E. given a job situation, the student will be able to answer any questions asked him and elaborate on some of them when deemed necessary.
   F. given a situation, the student will be able to determine which fringe benefits are good and which are not.
   G. given a choice, the student will be able to select what qualities make up a friendly personality that people admire.
   H. given a situation, the student will be able to sell his abilities and himself by convincing the interviewer that he has the qualifications necessary to fill the opening.
   I. given a job situation, the student will be able to know when the interview is finished.
   J. given a situation, the student will be able to take a performance test after interview if asked to do so.

VI. The student will understand the accepted procedures needed after the interview. Specifically the student will be able to:

   A. given a job situation, the student will be able to write a model letter thanking the interviewer for his time.
   B. given a job situation, the student will be able to relate how he would base his decision whether to accept the job offer or not.

VII. The student will realize the inter-relationship of steps involved in job application unit to actual employment seeking in the job market. Specifically the student will be able to:

   A. given sources of job openings in his community and surrounding areas, the student will be able to select the job opening he desires.
   B. the student will be able to use his model letter of application as a guide when he writes an actual letter of application.
   C. the student will be able to use a copy of his personal data sheet when he actually applies for a job.
   D. the student will be able to use his model letter asking permission to use certain names as references when he applies for a job.
   E. the student will be able to fill out an application blank for employment following the accepted rules of neatness, legibility, and completeness.
   F. given a situation, the student will be able to take an employment test applying skills learned.
   G. given a job situation, the student will be able to use a copy of his model thank-you letter after his actual interview.

VIII. The student will know what jobs are available and how to relate them to his needs. Specifically the student will be able to:

A. given a job situation, the student will be able to tell the need for office workers in the community and surrounding areas.
B. given sources of job openings, the student will be able to select the location for his job employment.
C. given a job situation, the student will be able to describe what types of jobs are available in his community and surrounding areas.
D. given case studies, the student will be able to describe the type of job that is best suited to his needs.

Unit: OFFICE CAREERS

Outline of Unit

I. Types of Offices

- A. Financial
    - 1. Banking
    - 2. Brokerage
- B. Sales and advertising
- C. General administration
- D. Staff offices
    - 1. Personnel
    - 2. Public relations
    - 3. Public information
- E. Professional offices
    - 1. Legal
    - 2. Medical and hospital
    - 3. Engineering and scientific
    - 4. Other
- F. Government
- G. Centralized office plan

II. Opportunities for Office Workers

- A. Promotional practices
- B. Training and opportunities for advanced study

III. The Personnel Office

- A. Basic functions of the personnel office
    - 1. Realization that workers are needed
    - 2. Identifying requirements of jobs to be done
    - 3. Recruitment
    - 4. Selection of workers
    - 5. Evaluation of workers
    - 6. Promotion of workers
- B. Methods of selecting office personnel
    - 1. Types of office
    - 2. Evaluation of prospective employees
        - a. Interview
        - b. Tests
        - c. References
- C. The relationship of the personnel office to employees

Goal Statement

The office worker must select, prepare for, and obtain the office career for which he is suited and in which he has an interest.

General and Specific Objectives

I. The student will understand specific duties of various business offices. Specifically the student will be able to:

   A. list the duties of specific business offices.
   B. define terms pertaining to various business offices.
   C. identify an office position for which special training is needed.
   D. select the type of specialized chores that are identified with specific job descriptions.
   E. match terms that would be identified with specific types of business offices.

II. The student will know what job opportunities are available in various offices. Specifically the student will be able to:

   A. identify beginning job opportunities in the specific types of business offices.
   B. name the field of employment in the United States that use the largest number of office workers.
   C. name the office position that is considered the beginning job for a secretary.

III. The student will know the qualifications necessary for employment in various types of offices. Specifically the student will be able to:

   A. identify the minimum typing requirement for initial employment as a typist in civil service.
   B. identify the shorthand rate that is considered the minimum requirement for initial employment in civil service.
   C. describe the criteria that serves as the basis for employment in civil service.
   D. list job skills necessary for particular types of office careers.
   E. rank office occupations according to number of positions available in each occupational area.
   F. identify steps necessary to prepare for a position in a specific type of office.
   G. select the most important single qualification needed to become an effective medical secretary.
   H. list requirements necessary for foreign service secretaries.

IV. The student will be aware of promotional practices for office workers. Specifically the student will be able to:

   A. identify areas in which office employment demands are highest.
   B. name the most important traits used for selecting office personnel for promotions.
   C. distinguish between the "Do's" and "Don't's" of an effective office image.
   D. select the office occupation in which fringe benefits are usually best.
   E. identify qualities used in determining salaries.
   F. distinguish between the terms "job evaluation" and "merit rating."
   G. match descriptions of training programs with the names of the programs.

V. The student will understand the basic functions of the personnel office. Specifically the student will be able to:

   A. select the best method of dealing with the personnel director during an interview.
   B. identify proper subjects to discuss during an interview.
   C. match various types of tests used in employment selection with their descriptions.
   D. explain how the personnel department determines positions needed within an organization.

Unit: UNDERSTANDING AND USING CREDIT WISELY

Outline of Unit

I. The Role of Credit in our Economic System

    A. Provides purchasing power
    B. Stimulates production
    C. Substitutes for money

II. Kinds of Consumer Credit

    A. Charge accounts
    B. Installment credit
    C. Three-pay, or 90-day account
    D. Revolving charge accounts
    E. Loan credit
    F. Bank card plans
    G. Travel and entertainment card plans
    H. Teen accounts

III. Establishing Your Credit

    A. Why consumers use credit
    B. Why some consumers avoid using credit
    C. Guides for extending credit--the three "C's"
        1. Character
        2. Capacity
        3. Capital

IV. Using Your Credit

    A. Determining the kind of credit to use
    B. The cost of credit
    C. Determining the amount of debt one can afford

V. The Cost of Using Credit

    A. Factors that determine the cost
    B Comparing credit costs

VI. Borrowing Money

    A. Consumer loan
    B. Where to obtain loans
        1. Banks
        2. Small-loan companies
        3. Credit unions
        4. Life insurance

Goal Statement

The business graduate of today must be able to deal realistically with the mechanics of credit in everyday life. He must be able to make wise credit decisions and know how to compute true interest costs.

General and Specific Objectives

I. The student will know that credit helps buyers meet needs and wants. Specifically the student will be able to:

   A. list the advantages of using credit in order to buy.
   B. define terms pertaining to credit.
   C. identify the types of products that are most often purchased through the use of credit.

II. The student will understand the types and cost of sales credit. Specifically the student will be able to:

   A. define the basic types of consumer credit.
   B. determine the true cost of different types of sales credit.
   C. distinguish between installment credit and charge accounts.
   D. list the two main requirements for the lender to be in compliance with the Lending Act.

III. The student will know how to use the mechanics of borrowing in order to buy. Specifically the student will be able to:

   A. calculate simple interest.
   B. determine the date of maturity of notes.
   C. distinguish between "interest" and "discount."
   D. identify the sources of consumer loans.
   E. label various parts of a promissory note.
   F. determine the total cost of an item purchased on the installment plan.
   G. select from a list of various lending agencies the one whose interest costs the least.

IV. The student will understand the advantages and disadvantages of installment buying. Specifically the student will be able to:

   A. select from various advertisements the one that gives the clearest information about the cost of buying the product on the installment plan.
   B. select the types of service for which a travel and entertainment card plan would be used.
   C. identify items that can be most wisely purchased on the installment plan.
   D. identify items that it would be most unwise to purchase on the installment plan.

V. The student will realize the importance of earning a good credit rating. Specifically the student will be able to:

A. distinguish characteristics of a good credit rating.
B. identify information needed on an application for credit.
C. distinguish whom the seller would most likely contact to determine a purchaser's credit rating.
D. select items that must be considered in granting credit.
E. identify items for which the buyer should obtain receipts.

VI. The student will realize that credit is a vital force in our economy. Specifically the student will be able to:

A. identify ways in which consumers use credit.
B. identify the most important reason why consumers use credit.
C. distinguish the most important factor considered in allowing an individual credit.

Unit: LIVING ON YOUR INCOME

Outline of Unit

I. Fundamentals of Money Management

    A. Definition of terms
    B. Need for money management plan

II. Credit

    A. Advantages and disadvantages of credit buying
    B. Types of credit plans
    C. Cost of credit
    D. Justification for use of credit

III. Planning a Budget

    A. Calculating expenditures
    B. Types of expenditures
    C. Characteristics of a good budget
    D. Techniques for setting up a budget

IV. Consumer Buying

    A. Making wise purchasing decisions
    B. Consumer spending and the budget

V. Savings and Investment

    A. Types of investments
    B. Purpose of various types of investments
    C. Savings and savings accounts
    D. Insurance
    E. Stocks and bonds

Goal Statement

The office worker must budget for the expenses he expects during a specified time period. He needs to set up, evaluate and, when necessary, revise his plan for the use of his income. He has to meet his needs and wants within the limits of his resources.

General and Specific Objectives

I. The student will understand the fundamental principles of money management. Specifically the student will be able to:

    A. given a list of definitions, select the one that best describes the primary role of money management.
    B. given a number of statements, identify the one that best expresses the most frequent cause of money management problems.
    C. define terms necessary for the study of money management.
    D. analyze how his values and goals affect his money management plan.

II. The student will comprehend the advantages and pitfalls of credit buying. Specifically the student will be able to:

- A. define the role of consumer credit in a money management plan.
- B. evaluate the advantages and disadvantages of credit buying.
- C. compare the different types of credit.
- D. state the yearly rate charged for the revolving type of credit plan.
- E. calculate the cost of the various types of credit.
- F. define terms related to credit and credit buying.
- G. given various situations, identify those which illustrate the proper use of credit.

III. The student will understand expenditures which are classified as "fixed" and "flexible" expenses. Specifically the student will be able to:

- A. distinguish between "fixed" and "flexible" expenses.
- B. given a list of expenses, identify those which are generally "fixed" expenses.
- C. identify ways in which he can control his flexible expenses.
- D. identify approximate amounts of income to allow for such items as food and shelter.
- E. compare the costs and benefits of home ownership to those of renting.
- F. given the amount of mortgage, duration of mortgage, and rate of interest, calculate the amount of interest paid over total mortgage period.

IV. The student will analyze ways for using spendable income efficiently. Specifically the student will be able to:

- A. given a number of statements concerning the purchase of goods, distinguish between opinion and fact.
- B. evaluate factors to be taken into consideration when selecting where to shop.
- C. define what is meant by the "real cost" of a purchased item.
- D. given a number of factors, determine whether an item bought "on sale" is really a bargain.
- E. given facts regarding cost, weight and description of various items, determine the wisest purchase choice.

V. The student will analyze various ways to achieve financial security. Specifically the student will be able to:

- A. given a list of possible answers, select the proportion of salary a family should have on hand for emergency purposes.
- B. identify the role of regular savings in the total money management plan of an individual or for a family.
- C. define terms used in relation to savings and investment.
- D. evaluate the merits of the different types of investments.
- E. identify the factors that can lead to successful saving.
- F. appraise the advantages of a savings account.
- G. identify the function of different types of insurance.

VI. The student will understand how to prepare and use a workable budget. Specifically the student will be able to:

A. define the role of a budget in a money management plan.
B. determine the characteristics of a good budget.
C. define the limitations on the role of a budget.
D. distinguish between items considered as income and those not considered as income.
E. identify the first steps to be taken in setting up a budget.
F. identify the best way to determine future expenditures.
G. identify principles upon which the success of a budget depends.
H. Given an amount of money desired and the time available to accumulate it, calculate weekly savings necessary to achieve a stated budget goal.

Unit: TYPES OF CONSUMER GUIDES

Outline of Unit

I. The Need for Consumer Guides

II. The Types of Consumer Guides Available

- A. Labels
- B. Advertisements
- C. Publications of consumer testing organization
- D. Government publications

III. Use of Available Guides

Goal Statement

As both employees and consumers, individuals need to know that certain consumer guides are available and how to use these guides effectively. The informed consumer will be able to utilize an appropriate guide in a given buying situation and interpret the available information in order to use his dollars more wisely.

General and Specific Objectives

I. The student will know what influences consumer choices. Specifically the student will be able to:

- A. list various factors that influence a consumer's choices.
- B. discriminate between factors that influence consumer's choices.
- C. identify factors that affect a consumer's choice in a given situation.

II. The student will appreciate the need for buying skill. Specifically the student will be able to:

- A. explain why a multiplicity of readily available products presents problems to the consumer.
- B. explain why the more we buy the greater is our need for buying skill.
- C. identify reasons why price is not always the best guideline.
- D. evaluate a person's standard of living compared with his income.

III. The student will know the major consumer guides available. Specifically the student will be able to:

- A. list the major consumer guides.
- B. briefly describe the guides listed.
- C. explain what information is found in each guide.
- D. given a particular item, identify the guide in which it would most likely be listed.
- E. match given items with the best information source for them.

IV. The student will interpret consumer information supplied by newspaper advertisements. Specifically the student will be able to:

A. given sample advertisements, list the important information in them.
B. distinguish different types of information given in each ad.
C. criticize each ad in terms of consumer need.
D. explain how the ad information would be helpful to the consumer.
E. indicate how the ad information would not be helpful to the consumer.

V. The student will interpret consumer information supplied by govenment agencies. Specifically the student will be able to:

A. list the types of consumer information govenment agencies provide.
B. identify the different duties of each govenment agency.
C. describe the differences between grade and descriptive labeling.
D. identify the different labels of different govenment agencies.

VI. The student will know how to utilize the Consumer Report Buying Guide. Specifically the student will be able to:

A. identify information in the guide for a particular brand of product.
B. compare information in the guide for similar products.
C. list types of information contained in the guide.
D. evaluate the information provided in the guide for a given product.
E. indicate the usefulness of the guide information to the consumer.

VII. The student will understand different types of advertisements. Specifically the student will be able to:

A. list different types of ads.
B. briefly describe each type of ad listed.
C. distinguish differences in various types of ads.
D. given a particular ad, classify it according to its particular type.

Unit: STENCIL DUPLICATION

Outline of Unit

I. Introduction

- A. Uses of duplicated copy
- B. Selection of duplication process
- C. Cost
- D. Terminology

II. Preparation of Stencil

- A. Guide copy
- B. Typewriting
- C. Making corrections
- D. Proofreading
- E. Supplies

III. Uses of Illuminated Drawing Board and its Accessories

- A. Handwriting
- B. Drawing
- C. Lettering

IV. Operation and Maintenance of Stencil Duplication

V. Special Types of Stencils

Goal Statement

An office worker must determine the appropriate uses of the stencil duplicating process, prepare stencils, use the illuminated drawing board and its accessories, and operate and maintain stencil duplicating equipment.

General and Specific Objectives

I. The student will recognize when it is appropriate to use the stencil process of duplication. Specifically the student will be able to:

- A. list the advantages of using the stencil process of duplication.
- B. list the disadvantages of using the stecil process of duplication.
- C. name 3 jobs that would be completed using the stencil process.

II. The student will know how to prepare the typewriter for stencil duplication. Specifically the student will be able to:

- A. explain when to clean the typewriter keys.
- B. explain when the ribbon position should be adjusted.
- C. identify when to adjust the paper-bail rollers for stencil.
- D. identify when to adjust the page-thickness gauge for stencil.

III. The student will know how to prepare a stencil. Specifically the student will be able to:

- A. list the parts of the stencil assembly and the purpose of each.
- B. given a drawing of a stencil sheet, identify the stub, page center, top edge paper guide, typewriter line spaces, and boundary for 8 1/2 inch by 11 inch or 8 1/2 inch by 14 inch paper.
- C. explain the procedure used to insert and remove the stencil to avoid damage
- D. explain proper stroking techniques when typing a stencil on a manual or an electric typewriter.
- E. describe how errors are corrected using a burnisher, correction fluid, and correction tape.
- F. describe four ways art work can be applied to a stencil.
- G. describe how to place handwriting on a stencil.
- H. list two ways color can be added to a stencil.
- I. given a copy duplicated by the stencil process, identify letter cut-outs, improper stroking, dark areas, and poor corrections.
- J. explain how a used stencil is filed.

IV. The student will have a knowledge of the materials and supplies used in stencil duplication. Specifically the student will be able to:

- A. given a specific duplication job, select the correct weight stencil.
- B. describe four special types of stencils that can be purchased and how they are used to simplify certain duplication jobs.
- C. given four different kinds of paper, identify the kind of paper used for stencil duplication.
- D. given a group of materials and supplies, identify correction fluid, correction tape, burnisher, protective cover, stencil wrapper, screen plate, lettering guide, inset, cushion sheet, film sheet, backing sheet, stencil sheet, writing plate, ink-pad, and T-square.

V. The student will have the ability to operate the stencil duplicator. Specifically the student will be able to:

- A. list two differences between a stencil duplicating machine that uses an ink pad and one that uses a silk screen.
- B. identify poor copies caused by a low supply of ink.
- C. know how to attach a stencil to the cylinder.
- D. adjust position settings so printed copy will be arranged attractively on the page.
- E. explain how the machine should be left when not in use.

VI. The student will know how to use the illuminated drawing board and its accessories. Specifically the student will be able to:

- A. explain when an illuminated drawing board is used.
- B. attach a stencil to a drawing board.
- C. given a group of styli, identify the stylus used for drawing, detail work, handwriting, lettering, and shading.
- D. explain when a screen plate is used.
- E. explain the purpose of a T-square.
- F. explain the purpose of a flexible writing plate.

Unit: OFFSET DUPLICATION

Outline of Unit

I. Introduction Presentation

- A. Offset principle
- B. Common business application
- C. Advantages and disadvantages of offset
- D. Safety rules
- E. Station arrangement

II. Supplies Used in Offset Duplicating

- A. Preparation of copy
- B. Preparation of offset duplicator

III. Procedure

- A. Preparing masters
  - 1. Different types of masters
  - 2. Typing techniques used in preparation of masters
  - 3. Drawing techniques used in preparation of masters
  - 4. Making corrections
- B. Preparation of offset machine
- C. Basic operation of the machine

Goal Statement

At the conclusion of this unit, the student should be able to prepare masters and operate offset duplicator. The student should have an appreciation of the functions and uses of the offset duplication process.

General and Specific Objectives

I. The student will understand how the offset fulfills the duplicating needs of a business office. Specifically the student will be able to:

- A. recognize what types of business jobs should be duplicated on the offset machine.
- B. list the advantages and disadvantages of using the offset.
- C. select the most advantageous method of duplicating various jobs of which one choice is the offset.

II. The student will have a knowledge of the supplies used and parts of the offset. Specifically the student will be able to:

- A. identify the use of supplies in preparing the offset master.
- B. identify the use of supplies in preparing the offset duplicator.
- C. identify basic functions of machine parts.

III. The student will be able to prepare an offset master. Specifically the student will be able to:

   A. select the size and style of master best suited for a particular job.
   B. prepare a master using typed copy.
   C. prepare a master using pencils, ink copy of two colors.
   D. prepare a photographic master.

IV. The student will be able to produce useable copy from the offset duplicator. Specifically the student will be able to:

   A. prepare the machine for operation.
   B. operate the offset machine.
   C. clean the offset machine.

Unit: SPIRIT DUPLICATING MACHINES

Outline of Unit

- I. Introduction
  - A. Accuracy in typewriting
  - B. Neatness and efficiency
  - C. Ability to follow directions
  - D. Use of correction materials
  - E. Desire to solve problems
  - F. Pride in doing detailed work
- II. Preparation of the Master
  - A. Typewriting and placement
  - B. Proofreading
  - C. Making corrections
  - D. Special effects--drawing, lettering, handwriting, and color
  - E. Supplies
- III. Operating and Maintenance of Machines
- IV. Special Projects
  - A. Master that has been typed on wrong end
  - B. Index or postal cards
  - C. Four-page program or folder
  - D. Multicolored copies
  - E. Use of narrow or odd size paper
  - F. Ruled forms or reports
  - G. Cover design--cartoons, calendar, menu

Goal Statement

At the conclusion of this unit, the students should know how to prepare a master and run off copies on a spirit duplicating machine. They should recognize the advantages and disadvantages of this process, and be able to decide its role in today's business office.

General and Specific Objectives

- I. The student will develop ability in the operation of spirit duplicating machines. Specifically the student will be able to:
  - A. select the proper methods used in attaching a master to the drum.
  - B. identify poor copies caused by low fluid supply.
  - C. replenish fluid supply.
  - D. specify the proper pressure-gauge for keeping the copy at the desired brightness and density.
  - E. choose position settings for the insertion of different sizes of material that may be used.

II. The student will have a knowledge of the selection of materials and supplies used in duplication. Specifically the student will be able to:

A. identify paper with special finish for running copies.
B. choose master to be used.
C. select fluid needed for duplication process.
D. list six ways to display material without using color or illustrations.

III. The student will have a workable knowledge in the preparation of a master. Specifically the student will be able to:

A. clean typewriter keys.
B. arrange material in desired location--placement.
C. use handwriting when needed.
D. apply drawings with special effects.
E. proofread each line for errors.
F. correct errors by using razor blade, block-out pencil, scotch tape, or scissors.
G. evaluate copies made on both manual and electric typewriters.

Unit: TEN-KEY ADDING MACHINE

Outline of Unit

I. Basic Business Arithmetic Review

   A. Reading numbers
      1. Whole
      2. Decimals
      3. Fractions
   B. Addition
      1. Decimals
      2. Fractions
   C. Subtraction
      1. Decimals
      2. Fractions
      3. Credit or negative balance
   D. Multiplication
      1. Decimals
      2. Fractions
      3. Reciprocals
         a. Discounts
         b. Chain discounts and net amount
         c. Commissions
      4. Complements

II. Introduction of Machine

   A. Common business applications
   B. Proper fingering for machine
      1. Home keys
      2. Proper reaches
      3. Special keys
         a. Motor bar or plus bar
         b. Total key
         c. Subtotal key
         d. Subtraction key
         e. Multiplication key
         f. Clear key
   C. Posture and position
   D. Demonstration
   E. Practice

III. Machine Operations

   A. Clearing
   B. Indexing
   C. Printing
   D. Totaling

IV. Maintenance of Machine

   A. Changing ribbon
   B. Replacing paper tape

V. Typical Applications

  - A. Reconciling bank statements
  - B. Checking extensions, calculating discounts
  - C. Computing payroll
  - D. Figuring percentages

VI. Occupational Intelligence in Machine Applications

  - A. Short cut multiplication
  - B. Constants
  - C. Fractions and decimal equivalents
  - D. Credit balance determinations

VII. Building Speed and Accuracy

  - A. Handwritten source documents
  - B. EDL skill builder

Goal Statement

The office clerk must know common applications for which the ten-key adding machine is used. He must be able to use the machine skillfully and accurately in the solution of arithmetical problems encountered in the business office.

General and Specific Objectives

I. The student will understand basic business arithmetic computation procedures used on the ten-key. Specifically the student will be able to:

  - A. given a list of multiple digit integers containing decimals and/or fractions, read them aloud so that they will be understood.
  - B. given a division problem, restate it so that it can be solved by multiplication.
  - C. given an addition problem containing a list of ten numbers with one six decimal places, add it correctly.
  - D. geven a problem in the multiplication of common fractions, restate it so that it can be solved using decimals.
  - E. given an addition problem containing negative numbers, determine if the balance is a credit or debit.
  - F. given a number as a base and a rate of percent, find a certain percent of that number.
  - G. find an unknown number when given the percent by which a part of that number is increased.
  - H. find an unknown number when given the percent by which a part of that number is increased.
  - I. find an unknown number when given the percent of decrease of a part of that number.

II. The student will use the ten-key adding machine skillfully and accurately in an office. Specifically the student will be able to:

A. given an invoice with completed extensions, compute the amount of discount if he is given the rate.
B. demonstrate the proper position to use while operating the machine.
C. given a statement of an employee's gross earnings and a list of his deductions, compute his net earnings.
D. given a customer's account and a list of payments and charge receipts, determine the balance of his account.
E. given an invoice with quantity, unit price and discount rate, compute the net cash required to make full settlement if paid in the discount period.

III. The student will understand the applications for which the ten-key is especially suited. Specifically the student will be able to:

A. given an invoice, make a selection of the proper arithmetical procedure to be used in completing the extensions.
B. given a problem involving extensive computations, select another machine when the job is not within the scope of the ten-key.
C. given a list of gross sales and a percentage rate for commission, select a procedure to find a salesman's commission.
D. given a bank statement, a list of outstanding checks and a checkbook balance, reconcile the bank statement.
E. given an invoice to audit, determine if the balance owed is correct.

IV. The student will demonstrate the ability to use the ten-key in appropriate business applications. Specifically the student will be able to:

A. given a value of real estate and a tax rate, determine the amount of taxes owed on the property.
B. given an account from the accounts receivable or accounts payable ledger, take subtotals to determine balance column amounts.
C. given two multiplication factors containing a different number of digits, save strokes by choosing the number with the most strikes as the multiplicand.
D. given an expense report, find total expenses to be reimbursed.
E. find the net amount when using chain discounts by using the complimentary percentages of each discount (multiplying in succession).

V. The student will know all operative parts of the machine. Specifically the student will be able to:

A. given an addition problem with a series of items, take a total.
B. given a report containing subtotal and total amounts, subtract one or more subtotals from the total to determine another subtotal amount.
C. given a column of 3-4 digit numbers, make a numerical notation in the column without disturbing the total.
D. given a multiplication problem, determine the key used in the rapid solution of the problem.
E. given an addition problem of six 10-digit integers, use the motor bar (plus bar) to register the numbers on the tape.

F. given an addition problem, clear counter dials if an incorrect number has been entered into the machine without bothering total.

VI. The student will perform routine adjustments to the machine. Specifically the student will be able to:

A. given a machine on which the paper tape has been exhausted, list the steps involved in changing the tape.
B. given a machine without a ribbon, list the steps involved in installing a ribbon.
C. given a problem in computing payroll, change the machine spacing to aid in checking tape.

VII. The student will appreciate the need for 100 percent accuracy in his work. Specifically the student will be able to:

A. state three reasons for constant verification of results.
B. identify errors made in computation procedures.
C. given a problem in payroll, verify gross earnings by auditing tape.
D. given a column of figures to add, easily check the totals by adding in the opposite direction.
E. as in efficient operator, complete every detail of an assignment before submitting the work for approval.

Unit: PAYROLL PROCEDURES

Outline of Unit

I. Laws Regulating Payroll

II. Purposes of Payroll

III. Completion of Records for New Employees

IV. Use of Time Cards

V. Determining Gross Earnings

    A. Salaried employees
    B. Time payment employees
    C. Commissions
    D. Bonus payments
    E. Piecework payments
    F. Pay periods

VI. Deductions from Gross Earnings

    A. Withholding tax
    B. Social Security
        1. Accumulated taxable earnings
        2. Present rates
    C. Other deductions required by law
        1. State
        2. Local
    D. Voluntary deductions
        1. Union dues
        2. Christmas clubs
        3. Insurance
        4. Other

VII. Determining Net Pay

VIII. Recording Payroll

    A. Payroll register
    B. Earnings records

IX. Paying Payroll

    A. Paying by cash
    B. Paying by check

X. Employers Payroll Taxes and Reports

  A. FICA quarterly annual reports
  B. Federal tax deposits
  C. Employer's quarterly federal tax return
  D. W-2 forms
  E. Unemployment compensation taxes
  F. Voluntary deductions remittances
  G. City and state reports
  H. Tax reconciliation forms

XI. Payroll Systems

  A. Manual
  B. Data processing
  C. Pegboard
  D. Accounting machine systems

XII. Payroll Accounting Entries

Goal Statement

At the conclusion of this unit, the students will be aware of the role that the payroll department plays in the running of a successful business. He will be able to perform the tasks normally required of a payroll clerk. He will have a knowledge of the laws affecting payroll and be able to be aware of recent developments in payroll systems.

General and Specific Objectives

I. The student will have an understanding of the role of the payroll department to the total business office. Specifically the student will be able to:

  A. identify information and records maintained by the payroll department that are needed by other departments.
  B. name the forms used by the personnel department that relate to the payroll department.
  C. list instances where the accounting department needs accurate records maintained by the payroll department in preparing financial reports.
  D. list deadlines for information for the office.
  E. name the information that the payroll department must secure from the office before preparing payrolls.
  F. list reasons for the need for cooperation between the payroll department and the business office.

II. The student will understand the effect of various laws on the payroll. Specifically the student will be able to:

  A. list federal regulations that govern regular and overtime pay.
  B. list federal and state regulations that goven deductions from employees' pay.
  C. name reports required by law to be filed.
  D. state when various reports must be filed.

III. The student will comprehend the various procedures involved in determining the pay of employees. Specifically the student will be able to:

  A. explain the difference in determining the pay of those employees on straight salary and those paid on a time basis.
  B. calculate wages owed to an employee who is paid on piecework basis.
  C. explain the difference between a bonus and a commission.
  D. compute the hours worked on a time card.
  E. analyze a time card and indicate the penalty for lateness and leaving work early.
  F. analyze a time card and indicate the overtime per day and per week.
  G. calculate the wages of an employee containing regular wages and overtime.
  H. read a chart and indicate deductions for both federal and state income tax, taking into consideration withholding exemptions and gross earnings.
  I. calculate the amount of social security deduction by using earnings multiplied by the rate after determining accumulated earn earnings to date.
  J. identify other deductions from earnings to get net pay.

IV. The student will understand the procedures involved in completing tax reports and the necessity for filing them when needed. Specifically the student will be able to:

  A. state the source of information for completion of tax reports.
  B. indicate the process of determining income to be reported on various forms.
  C. state when to stop reporting information about an employee.
  D. state how to organize work schedules to bring about efficiency in completing reports.
  E. perform computations necessary in completing reports.
  F. state penalty for late reports.
  G. explain the effect of late reports on other agencies.

V. The student will know the process involved in paying the employee. Specifically the student will be able to:

  A. list steps involved in paying employee by check.
  B. state what forms must be filled out if paying by cash.
  C. explain the procedure for securing cash from the bank for pay envelopes.
  D. explain the reason most businesses prefer to pay by check rather than by cash.

VI. The student will make decisions affecting payroll activities. Specifically the student will be able to:

A. select the proper forms needed to pay employees by cash.
B. determine when to begin preparing final reports so that they may be filed on time.
C. distinguish when the employee would not have any more deductions for social security.
D. select the proper withholding tax chart for determining tax deduction based on information provided by employee in regard to marital status and pay period.

VII. The student will understand how to organize activities so that there will be an even flow of work. Specifically the student will be able to:

A. list a process of placing time cards for employees use and collection by the payroll department.
B. state the process used when transferring information from the payroll register to the employee earnings records.
C. state the necessity for keeping earnings records in a systematic order.

VIII. The student will know various payroll systems. Specifically the student will be able to:

A. indicate the basic difference between manual and automated payroll systems.
B. list automated payroll systems.
C. explain how punched cards are used in automated payroll systems.
D. explain the basic source of data in an electronic data processing payroll system.
E. list the advantages of an electronic data processing payroll system over other automated payroll systems.

IX. The student will understand accounting entries affected by payroll. Specifically the student will be able to:

A. list accrual entries for payroll.
B. explain the effect payroll entries will have on accounts.
C. state what accounts would be debited and what accounts would be credited for payroll entries.

Unit: TELEPHONE TECHNIQUES

Outline of Unit

- I. Telephone Personality

    - A. Voice
    - B. Courtesy

- II. Proper Telephone Procedures

    - A. Planning and placing business calls
        - 1. Planning the call
        - 2. Placing the call
        - 3. Developing the call
        - 4. Terminating the call
    - B. Answering business calls
        - 1. How and when to answer
        - 2. Identification
        - 3. Summoning others to the phone
        - 4. Asking callers to wait
        - 5. Offering assistance
        - 6. Taking a message
        - 7. Interrupting and re-establishing a call
        - 8. Transferring a call
        - 9. Handling a call
        - 10. Safeguarding office information
        - 11. Screening calls

- III. Using the Directory

    - A. Introductory pages
    - B. Alphabetical pages
    - C. Yellow pages

- IV. Types of Telephone Calls

    - A. Local
        - 1. Special services
    - B. Toll (effect of time zones)
        - 1. Station-to-station
        - 2. Person-to-person
        - 3. Direct distance dialing
        - 4. Collect calls
        - 5. Credit card calls
        - 6. Overseas calls
        - 7. Conference calls

Goal Statement

The office worker must be able to handle telephone calls in a prompt, accurate and courteous manner. The worker must also be able to use the telephone directory intelligently and to take advantage of special services offered by the telephone company.

General and Specific Objectives

I. The student will use the correct telephone speech in performance of job duties. Specifically the student will be able to:

A. given a list of similar names, pronounce and give clarifying names for correct spelling.
B. given a list of numbers, pronounce them aloud.

II. The student will use the proper voice in speaking on the telephone. Specifically the student will be able to:

A. distinguish a voice that exhibits enthusiasm.
B. distinguish a voice that exhibits naturalness.
C. distinguish a voice that exhibits friendliness and pleasantness.
D. distinguish a voice that is clear and distinct.

III. The student will use courtesy in speaking on the telephone. Specifically the student will be able to:

A. given a list of responses, select those that show 'you" attitudes.

IV. The student will use the correct business procedure in answering and placing a business call. Specifically the student will be able to:

A. Identify the correct way to:
  1. Answer calls on the first ring.
  2. Identify self as an employee of a company.
  3. Summon the employer to the phone.
  4. Ask the caller to wait when the employer is on another phone.
  5. Offer assistance to the caller when the employer is not in the office.
  6. Take a message and relay it to the employer.
  7. Interrupt and re-establish a call to get needed information on a shipment.
  8. Transfer a call from the accounting department to the bookkeeping department.
  9. Handle a complaint about delivery date of a shipment.
  10. Screen a call for the employer.
  11. Terminate the call with a "thank you."
B. Demonstrate the proper way to accomplish 1-11 above.
C. Identify the correct way to:
  1. Verify the telephone number before calling.
  2. Dial the number.
  3. Allow time for the person to answer.
  4. Identify self as secretary or employee of company.
  5. Explain the nature of the call.
  6. Confirm information about which he called.
  7. Close the call by hanging up first.
  8. Replace receiver gently.
D. Demonstrate the proper way to accomplish 1-8 above.

E. Distinguish differences among the following types of calls:
  1. Station-to-station
  2. Person-to-person
  3. Direct distance dialing
  4. Collect
  5. Credit card
  6. Overseas
  7. Conference

F. Identify the correct way to place:
  1. A call to 1-515-623-7548.
  2. A call to Chicago where you will speak to anyone that answers.
  3. A call to the President of the Ski Valley Resort in San Francisco, California.
  4. A call to New York that will not be charged to you.
  5. A call to branch offices of the Smith Company to talk with six regional salesmen.

V. The student will know how to use resource material that relates to the telephone. Specifically the student will be able to:

A. given a telephone directory, identify information found in the:
  1. introductory pages
  2. alphabetical pages
  3. yellow pages

VI. The student will understand the importance of the telephone to the business office. Specifically the student will be able to:

A. given a situation, identify correct business use of the telephone.

Unit: RECEPTIONIST TRAINING

Outline of Unit

I. Desirable Personal Traits for a Receptionist

- A. Genuine liking for people
- B. Attractive appearance
- C. Poise, friendliness, courtesy, and tact
- D. Ability to handle callers properly
- E. Loyalty
- F. Initiative

II. Receiving Office Visitors

- A. Appointments
    - 1. Greeting callers
    - 2. Announcements to employer
    - 3. Handling callers without appointments

III. Housekeeping in the Office

- A. Orderly arrangement of the office
- B. Supply current reading materials
- C. Servicing of equipment

IV. Keeping a Log of Appointments

- A. Preparing employer's and secretary's desk calendars
- B. Maintaining caller's register
- C. Keeping an agenda of all meetings and appointments
- D. Keeping record of petty cash fund
- E. Maintaining a record of long-distance telephone calls

V. Developing an Attractive Voice

- A. Elements of speech
    - 1. Tone
    - 2. Pitch
    - 3. Volume
- B. Attitudes
    - 1. Friendly
    - 2. Cooperative
    - 3. Interested

Goal Statement

The receptionist must perform the duties of greeting callers, setting up appointments, and handling telephone calls accurately. She must adjust to varying personalities and understand the functions of the business office.

General and Specific Objectives

I. The student will understand the importance of properly applying good grooming principles to personal appearance. Specifically the student will be able to:

- A. demonstrate the uses of good make-up procedures in good grooming.
- B. distinguish possible ways to dress that would minimize her problem, given a situation in which a receptionist is over-weight.
- C. identify examples of appropriate business dress for the receptionist.
- D. describe the benefits derived from good grooming.
- E. given a situation in which the receptionist is trying to help others, describe the attitude the receptionist must have toward herself.
- F. given a situation in which a receptionist is inappropriately dressed, identify possible reactions of her employer.

II. The student uses proper techniques in greeting and displays courtesy in working with office visitors. Specifically the student will be able to:

- A. demonstrate courteous greeting to an office caller.
- B. given a role playing situation in which a caller comes into the office, select greeting procedures that are appropriate to the situation.
- C. given a role playing situation in which a caller does not have an appointment, demonstrate the proper way of handling the situation.
- D. given a situation where the receptionist introduces the caller to her employer, demonstrate the correct introduction procedures.
- E. given a situation where the caller arrives early for an appointment, identify appropriate procedures for handling the caller.

III. The student performs needed housekeeping procedures and maintains an attractive reception area. Specifically the student will be able to:

- A. given an illustration of possible furniture arrangement for the reception room, select the best arrangement.
- B. list the necessary supplies for the receptionist's desk.
- C. given examples of receptionist's supplies and equipment, demonstrate efficient arrangement of the receptionist desk.
- D. given a choice of a variety of reading materials, select those appropriate for the reception room.

IV. The student will accurately perform the record keeping duties required of a receptionist. Specifically the student will be able to:

   A. given a caller's register, record the incoming calls.
   B. given an appointment calendar, perform the task of making appointments.
   C. using the calendar of appointments, prepare an agenda for the president, personal director and sales manager of the office.
   D. given a situation where the executive has to cancel an appointment, describe the steps in handling the situation correctly.
   E. maintain a list of records of long distance calls.
   F. list steps for establishing the "petty cash" fund.
   G. list steps replenishing the "petty cash" fund.
   H. given a situation in which an executive receives an important telephone call during an interview, describe the steps necessary to handle their situation.
   I. given a situation in which the caller insists upon seeing the executive, who does not want to be seen, demonstrate the steps necessary in handling this situation.

V. The student will recognize the importance of an attractive voice and personality and their relationship to telephone communication. Specifically the student will be able to:

   A. given a tape recorder, record her voice.
   B. given a recording of her own voice, list weaknesses in use of the voice.
   C. given three examples of voice uses, distinguish between good and bad usage.
   D. given a telephone in a role playing situation, demonstrate:
      1. the "you" attitude.
      2. a cheerful tone.
      3. a friendly attitude.

VI. The student will use the voice and personality advantageously in performance of the duty of communicating with office visitors. Specifically the student will be able to:

   A. given examples of a receptionist's conversation with an office caller, select the most appropriate one.
   B. given a list of "courtesy expressions," select the ones that make for a pleasant business atmosphere.
   C. describe the results of poor communication.
   D. given a list of personality traits, select those applicable to her job.

Unit: RECORD KEEPING

Outline of Unit

I. Purpose of Records
    A. Need for records
    B. Characteristics of records

II. Cashier's Records
    A. Recording receipt of cash
    B. Recording to customers' accounts

III. Records of Transactions with Banks
    A. Deposits
    B. Writing checks
    C. Reconciliation of bank statement

IV. Petty Cash Records

V. Purchase Records
    A. Stock record cards
    B. Purchase requisition
    C. Purchase order
    D. Purchase invoice

VI. Sales Records
    A. Sales slip
    B. Recording sales to customers' accounts
    C. Monthly statements
    D. Credit memos

Goal Statement

Students should be familiar with office systems and procedures for recording financial activities. They should realize the need for financial records and the value of accuracy and neatness in such records. Using the recorded information, the student should be able to analyze and make judgments.

General and Specific Objectives

I. The student will be familiar with basic bookkeeping records. Specifically the student will be able to:
    A. identify cash forms.
    B. recognize petty cash transactions.
    C. distinguish between sales forms and purchase forms.
    D. select the subsidiary ledger accounts involved in transaction.

II. The student will have a knowledge of the application of business records. Specifically the student will be able to:

  A. prepare statements.
  B. record check stubs correctly and legibly.
  C. determine if a customer has overpaid or underpaid his account, given a sales invoice.
  D. record inventory increases and decreases on stock record cards.
  E. recognize underpaid purchase invoices.

III. The student will be able to perform necessary computations. Specifically the student will be able to:

  A. compute extensions.
  B. determine discounts to be taken.
  C. use adding machines and calculators to find net amounts.
  D. distinguish between realistic and unrealistic answers.
  E. calculate service charges.
  F. compute sales tax.

IV. The student will have the ability to record cash transactions accurately. Specifically the student will be able to:

  A. prepare forms required for incoming cash.
  B. replenish petty cash when needed.
  C. record petty cash transactions.
  D. reconcile bank statements.
  E. prove petty cash.

V. The student will have the ability to post from source records. Specifically the student will be able to:

  A. record credit memos to customers' accounts.
  B. sort vouchers for petty cash transactions.
  C. compile purchase orders from purchase requisitions.
  D. record invoices on customers' accounts.
  E. audit purchase requisition with purchase invoice.

Unit: RECORDKEEPING FOR PURCHASES

Outline of Unit

I. Introduction
    A. Need for purchasing records
    B. Identifying purchasing forms

II. Purchase Orders
    A. Inventories
    B. Requisitions

III. Receiving Reports

IV. Purchase Invoices
    A. Cash discounts
    B. Due dates
    C. Auditing extensions

V. Credit Memos

VI. Purchases Journal
    A. Recording
    B. Posting

VII. Accounts Payable Ledger

Goal Statement

The purchasing clerk must select purchasing forms, perform the necessary computations, post to the proper forms, and record purchasing transactions neatly and accurately. The records are used to provide verification of the order and are a basis for the cash payment.

General and Specific Objectives

I. The student will recognize the various forms used in purchasing transactions. Specifically the student will be able to:
    A. identify three types of purchasing forms.
    B. indicate the increase and decrease sides, given subsidiary ledger accounts.
    C. list the forms from which it was prepared, given a purchase invoice.
    D. recognize form on which returns and allowances are shown.
    E. select the necessary form for recording certain information given.

II. The student will make necessary computations in purchasing transactions. Specifically the student will be able to:

- A. calculate cash discounts on invoices.
- B. determine due dates for invoice payments.
- C. audit extensions, given completed invoices containing errors.
- D. determine net amounts with the aid of adding machines.
- E. judge the most logical answers, given realistic and unrealistic answers.
- F. make corrections, given form containing errors.
- G. compare creditors' accounts with controlling account and reconcile them.

III. The student will record the purchasing activities in proper sequence. Specifically the student will be able to:

- A. prepare a purchase requisition.
- B. given information needed for a purchase order, student will prepare form.
- C. compare the invoice with the purchase order.
- D. record the entry in the purchases journal.
- E. post to the subsidiary ledger.
- F. issue voucher checks to pay invoices.
- G. draw block diagram showing the proper sequence of purchasing activities.

IV. The student will comprehend the relationship of the various purchasing forms. Specifically the student will be able to:

- A. name the form used as a source document for a purchase order.
- B. differentiate between the purchase order and purchase invoice.
- C. differentiate between the purchase order and receiving report.
- D. indicate whether the invoice and payments increase or decrease the accounts payable accounts.
- E. state the advantages of recording purchases in a journal.

V. The student will recognize the value of purchasing records in an office. Specifically the student will be able to:

- A. list examples of merchandising businesses as opposed to service businesses.
- B. explain the benefit of taking the cash discount.
- C. explain the importance of filing invoice forms in order of due date.
- D. compute creditor's balance after each transaction.
- E. route forms correctly for next sequence.

Unit: RECORD KEEPING FOR SALES

Outline of Unit

I. Introduction

- A. Need for sales records
- B. Terminology
- C. Importance of accuracy

II. Sales Orders and Invoices

- A. Preparation of order forms
- B. Securing credit approval
- C. Preparation of invoice
  - 1. Computing extensions
  - 2. Computing taxes
- D. Office routing of prepared forms

III. Sales Journals, Cash Receipt Journals, and Sales Returns and Allowance Journals

- A. Nature of journals
- B. Recording journal entries

IV. Customer Accounts - Accounts Receivable Ledger

- A. Posting charges
- B. Sales returns and allowances

V. Statement of Accounts

- A. End of month billing
- B. Cycle billing

VI. Alternative Procedures

- A. Record keeping without a journal
- B. Record keeping without a ledger

Goal Statement

A clerical worker who handles sales transactions must be able to accurately and efficiently receive orders by various methods of communication, prepare invoices, and record the transactions in the proper journals and ledgers and prepare periodic billings.

General and Specific Objectives

I. The student will recognize the various forms used in the sales transactions. Specifically the student will be able to:

  A. given forms for sales orders, invoices and credit memorandums, distinguish among them.
  B. select the proper journal for recording each transaction.
  C. identify proper ledger accounts for posting.

II. The student will demonstrate ability to prepare forms accurately, legibly, and completely. Specifically the student will be able to:

  A. verify all computations.
  B. identify illogical information.
  C. write alphabetic and numeric information legibly.
  D. detect forms not completely filled out.

III. The student will understand the importance of accuracy, legibility, and completeness. Specifically the student will be able to:

  A. given examples of incomplete, illegible, or inaccurate forms, describe the results of each problem.
  B. given examples of incomplete, illegible, or inaccurate forms, describe the steps required to complete the forms correctly.

IV. The student will prepare orders received through various methods of communication. Specifically the student will be able to:

  A. complete an order form from information received through personal contact.
  B. complete an order form from information received over the telephone.
  C. complete an order form from information received in written form.

V. The student will perform necessary computations for sales transactions. Specifically the student will be able to:

  A. compute extensions.
  B. determine discounts to be allowed.
  C. determine appropriate machines to perform necessary calculations.
  D. operate machines to perform necessary calculations.
  E. determine sales tax from charts.
  F. determine sales tax by computation.

VI. The student will understand the techniques to be followed in the preparation of forms used in the sales department. Specifically the student will be able to:

  A. prepare the correct number of copies.
  B. complete sales slips, order forms, invoices and credit memorandums.
  C. route copies correctly.
  D. secure credit approval.

VII. The student will record sales transactions. Specifically the student will be able to:

- A. select the proper journal.
- B. analyze transaction for debit or credit entry.
- C. record entries in the journal.
- D. select the proper ledger account.
- E. distinguish between invoices and credit memorandums.
- F. record entries in the ledger.

VIII. The student will understand the steps involved in recording a sales transaction. Specifically the student will be able to:

- A. given a list of the steps not in sequence, rearrange them in the proper sequence.
- B. given a particular form used by the sales department, identify the next operation in the sales record keeping cycle.
- C. predict the results of the omission of any of the steps in the process.
- D. prepare a block diagram of the steps to be followed.

IX. The student will adapt proper recordkeeping procedures for sales to particular office situations. Specifically the student will be able to:

- A. identify recordkeeping changes required for recordkeeping without journals and ledgers.
- B. post directly from invoice to ledger.
- C. file invoices to be used as a ledger.

X. The student will prepare customer's billing. Specifically the student will be able to:

- A. distinguish between cycle billing and straight billing.
- B. verify computations on customer's account.
- C. prepare accurate and complete statements.

Unit: THE CHECKING ACCOUNT AND RECONCILIATION OF BANK STATEMENT

Outline of Unit

I. The Need for Keeping Accurate Financial Records and for Reconciling the Bank Statement

  A. Proving the accuracy of records by reconciling the bank statement
  B. Adjusting the checkbook balance to agree with the bank statement balance

II. Writing Checks and Handling Checking Accounts

  A. Signature card
  B. Filling out a check stub
  C. Writing the check
  D. Use care when you write checks

III. Preparing Deposit Slip and Checks for Deposit

  A. Name and account number of depositor
  B. Date
  C. Items to be deposited
    1. Currency
    2. Coins
    3. Checks
      a. How to list
      b. How and where to endorse
      c. Responsibility of endorser
      d. Kinds of endorsements

IV. Making and Recording Bank Deposits

  A. During banking hours
  B. Deposits made after hours
  C. Record deposit by adding to checkbook balance

V. Treatment of Lost, Stolen, or Erroneous Checks

  A. Voiding checks
  B. Stopping payment

VI. Verifying the Cash Balance

  A. Comparing the cash balance and the checkbook balance

VII. Reconciling the Bank Statement

  A. Outstanding checks
  B. Steps in bank reconciliation

Goal Statement

The office worker must be able to handle checking account transactions in an accurate and efficient manner. He must be able to keep adequate records of these transactions, reconcile the bank statement, and make the necessary adjustments.

General and Specific Objectives

I. The student will know the mechanics of handling checking account transactions. Specifically the student will be able to:

   A. define terms such as deposit slip, drawer, drawee, payee, ABA numbers, etc.
   B. list parts of checkbook.
   C. identify the parts of a check.
   D. identify the parts of a deposit slip.
   E. explain the purpose of an endorsement.
   F. define the different types of endorsements.
   G. identify examples of different types of endorsements.
   H. tell when each type of endorsement should be used.

II. The student will know what must be done to properly handle checking account transactions. Specifically the student will be able to:

   A. prepare currency, coins, and checks for deposit.
   B. list currency and coins on the deposit slip.
   C. properly endorse checks for deposit.
   D. endorse checks properly for any purpose.
   E. list checks on the deposit slip in one of three acceptable ways.
   F. fill out the checkbook stub.
   G. find the checkbook balance.
   H. bring the checkbook balance up to date by always subtracting checks written and adding deposits made.
   I. void a check properly.
   J. record a dishonored check.
   K. deposit money during banking hours or by using the night depository.
   L. stop payment on a check.

III. The student will realize the importance of accurately handling checking account transactions and reconciling the bank statement. Specifically the student will be able to:

   A. check bank statement information.
   B. make the necessary adjustments to the bank statement and checkbook balances.
   C. keep the canceled checks.
   D. bring into agreement the check stub balance and the bank statement balance.
   E. evaluate the accuracy of written checks.
   F. use correct procedures in the case of lost, stolen, erroneous, or forged checks.
   G. reconcile the bank statement as soon as the statement is received.

IV. The student will know the mechanics of reconciling the bank statement. Specifically the student will be able to:

- A. define the bank statement terms such as outstanding check, bank balance, bank statement, service charge, bank debits, and deposit in transit or outstanding deposit.
- B. fine coded entries on the bank statement that must be subtracted from the checkbook balance.
- C. list items shown on the bank statement.
- D. define codes such as CC, DM, ED, OD, RI, and SC.

V. The student will apply the mechanics of reconciling the bank statement. Specifically the student will be able to:

- A. assemble the materials necessary for reconciling the bank statement.
- B. arrange the checks in numerical order.
- C. determine the outstanding checks.
- D. list outstanding checks.
- E. deduct total outstanding checks from bank statement balance.
- F. add deposit in transit to bank statement balance.
- G. subtract total charges and fees from the checkbook balance.
- H. deduct charge for safe-deposit box from check stub balance.

VI. The student will apply his ability in tracking down and correcting errors. Specifically the student will be able to:

- A. verify the checkbook balance.
- B. deduct service charges, fees, bank debits, etc. from the check stub balance.
- C. journalize the post service charges, fees, bank debits, etc.
- D. adjust a deposit recorded incorrectly.

Unit: USING REFERENCE SOURCES FOR BUSINESS INFORMATION

Outline of Unit

I. Types of Reference Sources

  A. Standard
    1. Dictionary
    2. Telephone directories
    3. Secretarial handbook
    4. Style manuals
    5. Thesaurus
  B. General information
    1. Books of facts
      a. Almanac
      b. Encyclopedia
      c. Geographic
    2. Special
      a. Travel guides
      b. Postal guides
      c. Biographical
      d. Blue books
      e. Business directories
      f. Etiquette
      g. Periodicals
      h. Parliamentary procedure

II. When to Use Standard References

  A. Dictionary
    1. Spelling
    2. Word division
    3. Word usage
    4. Pronunciation
  B. Telephone directories
    1. Locating numbers
    2. Verifying information
  C. Secretarial handbooks
    1. Punctuation
    2. Capitalization
    3. Numbers
    4. Letter parts
  D. Style manual
    1. Company formats
    2. Technical terms
  E. Thesaurus
    1. Synonyms
    2. Antonyms

III. When to Use General Information References

- A. Books of facts
  - 1. Verifying data
  - 2. Authenticating facts
  - 3. Locating information
- B. Special references
  - 1. Rates
  - 2. Locations
  - 3. Business area information

IV. How to Use Reference Sources

- A. Index
- B. Table of contents
- C. Miscellaneous listings

V. Locating Reference Sources

- A. Libraries
- B. Telephoning
- C. Writing
- D. Chambers of commerce
- E. Governmental agencies

Goal Statement

When it becomes necessary to authenticate or verify certain information the office worker must rapidly and accurately locate specific information in the appropriate reference source.

An office worker must further recognize the importance of having available and of using as many reference sources as needed for a particular job. The worker must also set up a reference source library for personal use when beginning a new job and be able to do so within a given budget.

General and Specific Objectives

I. The student will use reference sources proficiently when given a dictionary, zip code directory, telephone directory, style manual, etc. Specifically the student will be able to:

- A. correct spelling errors in a list of 3-10 letter words.
- B. identify the correct zip code for an address in the United States.
- C. verify the area code of a city in the U. S.
- D. capitalize the proper words in a paragraph.
- E. hyphenate, according to business usage, 1-3 syllable words found at the end of a line.
- F. prepare, in an acceptable nonmilitary style, an unarranged business letter containing special parts.
- G. determine the correct time when making a call from one time zone to another.

II. The student will demonstrate the ability to rapidly use reference sources. Specifically the student will be able to:

- A. locate the telephone number of an individual when given the necessary information.
- B. circle the words misspelled in a paragraph.
- C. match words with their synonyms from a list of 20 words.
- D. list the address of a specific hotel on the East Coast when the city is given.
- E. check the meaning of a foreign phrase.

III. The student will know information in reference sources. Specifically the student will be able to:

- A. compare a table of contents and an index.
- B. explain how to find a zip code when given the name of a city and state on the West Coast.
- C. find how post offices are listed in the Directory of Post Offices.
- D. explain why the yellow pages of a telephone directory are used.
- E. locate the map of time changes occurring throughout the U. S.
- F. given a key word from a quotation, locate the entire quotation.
- G. explain how to locate an idea-related word when only the original word and a nonalphabetic thesaurus are given.

IV. The student will know which reference source to use. Specifically the student will be able to:

- A. choose the correct source when given a question involving verifying facts.
- B. determine the source to use to check abbreviations.
- C. select the source to use to authenticate given statistics.
- D. name the source used to verify the background information on famous living Americans.
- E. determine the reference source that is the "blueprint" for the formal conference.
- F. check the placement of special letter parts.

V. The student will apply knowledge to setting up a reference library. Specifically the student will be able to:

- A. describe the reference sources used in a real estate or legal office.
- B. list the titles and authors (or publishers) of the books most used in a specified office when given an allotment of only $50.
- C. indicate the general information references used to determine the distance (air) from one point to another.
- D. indicate the most important references in an office where the employer travels a great deal.
- E. display those sources needed in a specified office by using the resources of the company.

VI. The student will appreciate the importance of using reference sources. Specifically the student will be able to:

A. predict the possible consequences of not using reference sources to locate information.
B. verify spelling of names and addresses of persons appearing on a mailing list.
C. improve the wording of a one page report.
D. confirm the pronunciation of various words heard in a speech.
E. choose an appropriate quotation to finish a report on the given topic.

VII. The student will know how to locate reference source. Specifically the student will be able to:

A. given a situation where government documents are needed, state the swiftest means of obtaining these documents.
B. explain the major purpose of a news clipping bureau.
C. describe the process used to obtain credit rating reports.
D. use the READER'S GUIDE to locate magazine articles.
E. indicate the most likely place to locate a report written by the research department of the company five years ago.

Unit: FILING

Outline of Unit

I. Why a Business Maintains Files

II. Basic Rules for Alphabetic Filing

III. Basic Rules for Numeric Filing

IV. Basic Rules for Geographic Filing

V. Basic Rules for Subject Filing

VI. Filing Equipment

VII. Information Retrieval

VIII. Retention and Disposition of Files

Goal Statement

At the conclusion of this unit, students should have skills in identifying, storing, retrieving, retaining and disposing of business records. They should also recognize the need for filing, and be able to select and maintain the best filing system for different types of businesses.

General and Specific Objectives

I. The student will develop an appreciation of the importance of filing in business. Specifically the student will be able to:

- A. list reasons for setting up a filing system for a business.
- B. list types of records that must be filed.
- C. identify correspondence according to system used in business.

II. The student will know how to arrange correspondence according to systems used in business. Specifically the student will be able to:

- A. describe each of the filing systems.
- B. define terminology used in filing.
- C. index a list of names.
- D. arrange alphabetically indexed names.
- E. arrange items according to numeric system.
- F. arrange names according to geographic location.
- G. alphabetize a group of records by topic.

III. The student will know how to select the best filing system for a specific business. Specifically the student will be able to:

- A. list the advantages of the filing system.
- B. select the supplies and equipment to be used in each system.
- C. describe an appropriate filing system for a given business.

IV. The student will know how to systematically find filed correspondence. Specifically the student will be able to:

  A. retrieve specified items from a numeric file.
  B. retrieve specified records from a subject file.
  C. retrieve correspondence from specified firms.
  D. retrieve a specific record from a geographic file.

V. The student should have an understanding of when and how records should be retained and destroyed. Specifically the student will be able to:

  A. list the factors affecting the retention value of records.
  B. describe types of records that should be retained in a given business.
  C. identify what records should be destroyed in a given business.
  D. describe how records should be destroyed.
  E. select the length of time specific records should be retained.

Unit: HANDLING THE MAIL

Outline of Unit

- I. Duties and Qualifications Needed by Employees Working With the Mail
- II. Use of Postal Publications
    - A. Keeping postal information and materials up-to-date
    - B. Decision-making concerning mailing classification and services
- III. Organization of Work Area
- IV. Use of Materials and Equipment
- V. Processing the Mail
    - A. Incoming mail
        - 1. Obtaining
        - 2. Presorting
        - 3. Opening
        - 4. Checking contents
        - 5. Time stamping
        - 6. Keeping records of certain mail
        - 7. Sorting
        - 8. Distributing
    - B. Outgoing mail
        - 1. Collecting mail from each department and/or office
        - 2. Checking for enclosures, signatures, etc.
        - 3. Checking envelopes for correct addresses, zip codes, and special notations
        - 4. Folding and inserting correspondence into envelopes
        - 5. Sealing envelopes
        - 6. Weighing and stamping each piece of mail
            - a. Determining mailing classification
            - b. Considering special service notations
        - 7. Sorting mail according to city and state destinations
        - 8. Sending or taking mail to post office for dispatching
- VI. Pride in Work

Goal Statement

The employee responsible for handling incoming mail must process it throughout the various departments of the business in the most prompt and efficient ways possible. The employee responsible for handling the outgoing mail must prepare it so that it will promptly and safely reach its destination.

General and Specific Objectives

I. The student will understand the duties and qualifications of an employee assigned the task of handling the mail. Specifically the student will be able to:

  A. given a list of office duties, select those applicable to the duties of an employee handling the mail.
  B. given a list of qualifications of an office worker, identify those qualifications needed for handling the mail.
  C. given a list of personal qualities, identify those needed for performing the task of handling the mail.

II. The student will understand the need for keeping postal information and materials up to date. Specifically the student will be able to:

  A. given the names of publications, identify those which give the postal rules and regulations.
  B. given the postal manual and a list of 5-10 items for mailing, figure the rate of postage.
  C. given revised supplements, remove outdated data from postal manuals and replace it with current data.
  D. given a postal manual, use a marking pencil to identify the most frequently used postal information found in this publication.

III. The student will understand the importance of keeping the work area organized. Specifically the student will be able to:

  A. given the necessary materials for the work area, arrange them in order.
  B. rearrange a disorganized mail work area.
  C. identify the outcomes of not having the work area properly arranged.

IV. The student will use the best methods and procedures for handling the mail accurately and expeditiously. Specifically the student will be able to:

  A. given a stack of incoming mail, list the steps for processing.
  B. given 15 to 20 pieces of incoming mail, follow the steps for processing.
  C. given a situation in which the mail has been handled incorrectly, identify the consequences.
  D. given a stack of outgoing mail, list the steps for getting the mail ready to be dispatched.
  E. given a stack of outgoing mail, sort it according to its mailing classification.

V. The student will properly utilize the materials and equipment needed in handling both the incoming and outgoing mail. Specifically the student will be able to:

  A. given a list of labor-saving methods and devices, select those which can best enable him to work systematically.

- B. given a list of office supplies, identify those which will be needed at the mail desk to enable him to expedite the handling of the mail.
- C. given the needed equipment and supplies to perform the duties of a mail clerk, explain how to use them effectively in order to save time and money.

VI. The student will make the right decisions concerning classifications of postage and special services for sending mail. Specifically the student will be able to:

- A. identify the precautions to be taken before releasing outgoing mail.
- B. given current postal information, determine the rate of postage.
- C. given a list of items to be mailed, select the correct mailing classification and the special handling needed.

VII. The student will take pride in carrying out the duties of handling the mail, executing accuracy and cautiousness in distribution and dispatching. Specifically the student will be able to:

- A. given the situation wherein a piece of confidential mail was opened through error, identify precautions to take to avoid a repetition of this mistake.
- B. given situation wherein a number of pieces of mail are to be dispatched just after closing time, identify the appropriate time to prepare them for mailing.
- C. given numerous pieces of correspondence to distribute, distinguish the need for immediate processing.

Unit: MEETING THE PUBLIC IN PERSON

Outline of Unit

I. The Company's Relationship to the Public

  A. General knowledge of the company
  B. Business-community relations
  C. Public relations of the company
  D. Loyalty to company policies
  E. Loyalty to employer

II. Receiving the Public

  A. Greeting visitors
  B. Making the visitor comfortable while waiting
  C. Conversing with the visitor
  D. Introducing visitor to employer

III. Grooming for the office

  A. Dress
  B. Accessories
  C. Make-up and hair styling
  D. Perfume

Goal Statement

The secretary must be able to converse pleasantly with many different types of individuals. An attractive appearance and a command of acceptable social practices are essential to the secretary. She must be able to present tactfully the company's viewpoint in difficult situations.

General and Specific Objectives

I. The student will have an understanding of the importance of learning as much as possible about the company. Specifically the student will be able to:

  A. identify ways in which he can benefit from knowing about the company.
  B. identify ways in which the company will benefit from his knowing about the company.
  C. give examples of lack of knowledge about a company.
  D. list the types of information he would like to know about a company.
  E. identify ways he can benefit from knowing the personnel of the company.
  F. given a case study in which an employee does not have information about a company, select the best place to find this information.

II. The student will know where to find information about the company--its policies, public relations programs and community activities. Specifically the student will be able to:

A. list sources of information about a company.
B. compare public relations activities of two or more local companies.
C. compare personnel policies of two or more local companies.
D. list the community activities of a local company.
E. list the personnel policies he would consider important for a company to have.
F. given a case study in which an employee lacks information about company activities, select the correct place to find the information.

III. The student will appreciate the importance of loyalty to the business and to the employer. Specifically the student will be able to:

A. define loyalty.
B. list reasons why the employee should be loyal.
C. given case studies, cite examples of loyalty or disloyalty.
D. compare how different individuals display aspects of loyalty in case studies.
E. identify consequences of not being loyal.
F. identify benefits of a loyal employee to the employer.
G. given a case study in which an employee is disloyal to the employer, analyze methods of dealing with the employee.

IV. The student will understand the importance of not revealing confidential information. Specifically the student will be able to:

A. list types of information considered to be confidential.
B. list what he would not want a person to reveal about himself.
C. given case studies, determine if confidential information is revealed.
D. classify types of information stating whether it would be confidential or non-confidential.
E. select case studies in which the revealing or confidential information is justified.
F. given a case study in which an employee is asked to reveal confidential information, determine whether to give the information.

V. The student will recognize the importance of creating a friendly atmosphere in which the visitor feels at ease. Specifically the student will be able to:

A. list the personal qualities a secretary should possess.
B. identify the components of the "you" attitude.
C. identify the physical arrangements of a typical secretary's office that would help create a pleasing atmosphere.
D. choose the best office arrangement from several pictures.
E. give situations in which the secretary receives visitors, determine if the secretary was friendly.

F. identify the consequences of not being friendly to a visitor.
G. given a case study in which the secretary has a conflict between completing her work and entertaining a visitor, determine which has priority.
H. given a case study in which an employee will suggest furnishings for an office, select the most appropriate items.

VI. The student will know the value of creating a favorable first impression on a visitor--by appearance, speech, and courteous manner. Specifically the student will be able to:

A. identify faults and good points in other students' speech.
B. make suggestions for improving poor speech patterns.
C. select appropriate hair styles for different facial types.
D. differentiate between types of perfumes.
E. select perfumes appropriate for the office.
F. given a list of possible purchases for a specified sum, select the most appropriate office attire.
G. given a case study listing personal qualifications of three girls, select the one best suited for a particular job.

VII. The student will demonstrate the correct method of introducing visitors to the employer. Specifically the student will be able to:

A. state the correct form for introducing a woman to a man.
B. state the correct form for introducing a man to a man.
C. select the reasons for following the correct form of introductions.
D. identify incorrect introductions in role-playing situations.
E. identify the consequences of incorrectly identifying a person.
F. given case studies about the correct manner to introduce visitors to the employer, select the correct method.

VIII. The student will understand the importance of being able to converse on different planes with different visitors. Specifically the student will be able to:

A. list the types of individuals one might encounter in the office.
B. select individuals who demonstrate the ability to talk with different persons in role-playing situations.
C. select topics of conversation suitable for different types of office callers.
D. distinguish between good and bad conversations in case studies.
E. given a list of conversational topics and information about four visitors, select those most appropriate for each.

Unit: PLANNING BUSINESS MEETINGS AND CONFERENCES

Outline of Unit

I. Staff Conferences

  A. Arrangement of facilities
  B. Preparing the agenda
  C. Notifying persons of the meeting
  D. Conference activities
  E. Post-conference activities

II. Formal Business Meetings

  A. Arrangement of facilities
  B. Preparing the agenda
  C. Accommodations for guests.
  D. Publicizing the meeting
  E. Conference activities
  F. Post-conference activities

Goal Statement

The secretary must be able to plan and coordinate meetings ranging from small staff conferences held in the local office to large group meetings held in a hotel or convention center.

General and Specific Objectives

I. The student will understand a secretary's pre-conference duties. Specifically the student will be able to:

  A. select appropriate facilities for different meetings.
  B. list equipment to be placed in the meeting room.
  C. list supplies to be placed at each participant's seat
  D. prepare meeting notices.
  E. discuss methods of anticipating attendance
  F. reserve a meeting room.
  G. discuss principal differences between a formal and an informal meeting.

II. The student will know to prepare an agenda. Specifically the student will be able to:

  A. duplicate a hand-written agenda.
  B. correctly arrange topics (in order) for an agenda.
  C. list order of business.
  D. prepare a heading for an agenda.
  E. select persons to whom an agenda should be sent.

III. The student will know to prepare a conference room for a meeting. Specifically the student will be able to:

- A. list items to be placed in the conference room.
- B. select materials to be put in a packet for each person attending.
- C. list supplies the secretary will need.
- D. distinguish appropriate physical arrangements of the room.
- E. identify correct seating arrangements.

IV. The student will understand a secretary's duties during a meeting. Specifically the student will be able to:

- A. define a quorum.
- B. take minutes of a meeting.
- C. record the minutes in correct form.
- D. prepare a summary of a meeting.

V. The student will understand a secretary's duties following a meeting. Specifically the student will be able to:

- A. distinguish what to do with items left in the room.
- B. write a congratulatory letter.
- C. make calendar notations of matters requiring further attention.
- D. file documents used at the meeting.

VI. The student will know the basic rules of parliamentary procedure. Specifically the student will be able to:

- A. identify two accepted sources of parliamentary authority.
- B. identify examples of main, subsidiary, and incidental motions.
- C. state correct form for amending a motion.
- D. differentiate between a point of order and a point of information.
- E. list three privileged motions.
- F. identify an example of a division of a question.

VII. The student will know how to publicize a meeting. Specifically the student will be able to:

- A. list newspapers, radio, and TV stations in the immediate area.
- B. select subjects and/or incidents to be photographed.
- C. prepare a news release.
- D. prepare biographies of speakers and/or outstanding guests.
- E. check details for accuracy.
- F. state the five "W's" of journalism.
- G. list the rules for typing news articles.

VIII. The student will make arrangements for out-of-town guests. Specifically the student will be able to:

- A. reserve a room.
- B. write a letter of confirmation.
- C. explain "hold for arrival" or "guaranteed arrrival."
- D. list items that may be placed in a guest's room as a welcoming gesture.

Unit: SPECIAL BUSINESS COMMUNICATIONS

Outline of Unit

I. Interoffice Memorandum

- A. Need for interoffice memorandum
- B. Characteristics of interoffice memorandum
- C. Preparation of interoffice memorandum

II. Telegram and Telefax Messages

- A. Domestic service
- B. International service
- C. Dispatching
- D. Receiving
- E. Special services
- F. Preparation of telegram and telefax

III. Business Reply Message

- A. Need for business reply message
- B. Characteristics of business reply message
- C. Preparation of business reply message

Goal Statement

The office employee must recognize the importance of communicating with other businesses as well as with the various departments within the company in a particular situation. He must also be familiar with telegraphic terminology and with the various telegraphic services. Perhaps most important, he must be skilled in typing and preparing the forms for office communication.

General and Specific Objectives

I. The student should develop an understanding of the importance of the interoffice memorandum. Specifically the student will be able to:

- A. list the types of "within company" messages that might require the use of an interoffice memo.
- B. select examples of appropriate uses of a memo.
- C. identify the parts of a memo.
- D. type an interoffice memo.

II. The student should know when to use a telegram to convey a message. Specifically the student will be able to:

- A. list specific types of messages that require the use of telegraphic services.
- B. describe each type of the domestic services.
- C. describe each type of international service.
- D. select the appropriate service to use when sending a message from one time zone to another.

III. The student should develop an understanding of ways of dispatching and receiving a telegram. Specifically the student will be able to:

A. describe ways a message may be filed.
B. define terminology used in dispatching and receiving.
C. list ways a telegraph service may be paid for.
D. list ways a message may be delivered.

IV. The student should know how to prepare a telegram. Specifically the student will be able to:

A. count chargeable words in a domestic telegraphic message.
B. count chargeable words in an international message.
C. list specific words that may be omitted from telegrams without changing the meaning of the message.
D. type a telegram.

V. The student should appreciate the special telegraphic services. Specifically the student will be able to:

A. identify the special services that are available.
B. define related terminology.
C. decide when to use the special services.

VI. The student should develop an appreciation of the business reply message. Specifically the student will be able to:

A. describe the parts of the business reply message.
B. type a business reply message.
C. explain the route of each of the three copies of the message.

Unit: GOOD HOUSEKEEPING, TYPING EQUIPMENT, AND SUPPLIES

Outline of Unit

- I. Secretarial Furniture
    - A. Secretary's desk
        - 1. Construction
        - 2. Size
        - 3. Pedestals
    - B. Secretary's chair
    - C. Auxiliary furniture
        - 1. Credenza
        - 2. Bookcases
        - 3. Two drawer file
    - D. Care of furniture
    - E. Color considerations
- II. Typewriters
    - A. Selection of model
        - 1. Manual vs. electric
        - 2. Carriage width
        - 3. Platen
        - 4. Type size
        - 5. Type style
        - 6. Special characters
        - 7. Proportional spacing
        - 8. Special devices
    - B. Care of typewriters
        - 1. Daily
        - 2. Weekly or monthly
        - 3. Maintenance contracts
    - C. Special typewriters
        - 1. Varityper
        - 2. Justowriter
        - 3. Flexowriter
        - 4. MTST-Mag Card
- III. Stationery and Supplies
    - A. Types of paper
        - 1. Bond
            - a. Letterhead
            - b. Second page
        - 2. Manifold
        - 3. Envelopes
        - 4. Mimeograph
        - 5. Duplicator
        - 6. NCR and Copysets
        - 7. Carbon paper

- B. Typewriter ribbons
  - 1. Cotton
  - 2. Nylon
  - 3. Carbon
- C. Miscellaneous supplies

IV. Work Area

- A. Good housekeeping
- B. Working methods
- C. Handling supplies

Goal Statement

The office worker must be able to recommend appropriate types of office furniture, typing equipment, and supplies; care for them properly; and effectively maintain an acceptable work station.

General and Specific Objectives

I. The student will know the different types of furniture available and normally used in a modern office. Specifically the student will be able to:

- A. identify different types of desks.
- B. specify standard desk heights.
- C. identify items of auxiliary furniture.

II. The student will know the various differences in typewriters. Specifically the student will be able to:

- A. list two advantages and two disadvantages of electric machines,
- B. identify pica, elite, primary, and proportionally spaced type.
- C. select the correct platen for a given situation.
- D. identify standard carriage widths.
- E. identify the functions of special devices.
- F. explain the functions of special purpose typewriters.

III. The student will understand how to care for the typewriters properly.

- A. identify the materials used in cleaning the type.
- B. distinguish between daily and weekly maintenance needs.
- C. list the advantages of a maintenance contract.

IV. The student will know the proper papers to select for particular needs. Specifically the student will be able to:

- A. define the terms used to describe paper: bond, manifold, NCR.
- B. identify the uses of various weights of carbon paper.
- C. distinguish between mimeo and duplicator paper.
- D. identify different sizes of envelopes.
- E. select proper envelopes for use in a given situation.

V. The student will recognize the supplies commonly required to set up a work station. Specifically, the student will be able to:

A. list the different kinds of typewriter ribbons commonly used.
B. identify the characteristics of cotton, nylon, and carbon ribbons.
C. set up a secretarial desk with common items.
D. select the proper method of correcting errors in a given situation.

VI. The student will know how to maintain a work station. Specifically the student will be able to:

A. practice good housekeeping techniques.
B. ananlyze activities for efficient work flow.
C. identify methods of maintaining supply inventories for ordering purposes.
D. identify sources of information for supplies and equipment.
E. identify procedures used in ordering new supplies.

Unit: MANUSCRIPT AND STATISTICAL TYPING

Goal Statement

The office employee is often responsible for the arranging and typing of tables, reports that include statistical data, publicity releases, speeches, and proposals essential to the operation of today's business office.

This material must be accurately prepared, with an attractive appearance to the reader, and be neatly arranged on the page. The employee must be familiar with the mechanical features of the typewriter utilized in preparing such material and have an insight into the selection of supplies necessary to produce the desired copies.

General and Specific Objectives

I. The student will have a workable knowledge of the preparation of legal forms. Specifically the student will be able to:

  A. select the needed materials.
  B. use the correct form for personal names which appear in a document.
  C. distinguish forms which are printed and sold in a stationery store.
  D. use correct format to work quantities in content.
  E. set margin stops so that copy will appear within printed lines on the forms.

II. The student will display skill in the typing of legal papers. Specifically the student will be able to:

  A. prepare the correct number of carbon copies.
  B. use good techniques to assure correct alignment of carbon copies.
  C. check pertinent information prior to beginning the typing of legal papers.
  D. decide which errors may be erased and corrected.
  E. follow rules for correct spacing (double, single).

III. The student will prepare financial reports with several columns. Specifically the student will be able to:

  A. check files for an established format to be used as a model.
  B. center heading for the report.
  C. set tabs at desired locations for money columns.
  D. use ratchet release key for typing double ruled lines under totals.

IV. The student should proofread carefully and check the accuracy of the finished product. Specifically the student will be able to:

  A. read aloud the spelling of proper names to a co-worker.
  B. verify dates in content.
  C. note omissions or transposed words.
  D. evaluate product for useability.

Unit: REVIEW OF BASIC TYPEWRITING SKILLS FOR THE CLERICAL ACCOUNTING, CLERK TYPIST, AND STENOGRAPHY BLOCK PROGRAMS

Outline of Unit

I. Basic Typing Techniques

- A. Position at typewriter
- B. Key stroking
- C. Spacing
- D. Carriage return
- E. Shift keys
- F. Tabulator
- G. Margin setting

II. Basic Skill Applications

- A. Business letter
  - 1. Letter styles
    - a. Block
    - b. Modified block
    - c. Modified block with indentions
    - d. AMS simplified
  - 2. Proper placement
    - a. Short letter
    - b. Average letter
    - c. Long letter
    - d. Two-page letter
  - 3. Punctuation
    - a. Open
    - b. Closed
    - c. Mixed
  - 4. Carbon copies
  - 5. Folding of letters
- B. Inter-office memos
  - 1. Pre-printed
  - 2. Self-made
- C. Envelopes
  - 1. Regular (small)
  - 2. Legal (large)
- D. Manuscripts
- E. Tabulation
  - 1. Vertical centering
  - 2. Horizontal centering - backspace-from-center technique
- F. Arranging and typing tables
- G. Rough Drafts - proofreading symbols
- H. Business forms and reports

III. Proofreading and Making Corrections

IV. Work Habits

- A. Ability to follow directions
- B. Ability to analyze each problem
- C. Ability to work independently

Goal Statement

The office worker must be able to apply basic typewriting skills to a variety of different jobs. The worker must be able to arrange and correctly type manuscripts, reports, tables, forms, letters, and envelopes. He must also be able to make carbon copies, to proofread, to correct all errors neatly and quickly, and to display efficient typewriting work habits.

General and Specific Objectives

I. The student will understand the importance of proper technique in typing as they relate to success in the business world. Specifically the student will be able to:

  A. demonstrate correct posture for typing.
  B. identify orally or in writing the various parts of the typewriter.
  C. describe correctly the various parts of the typewriter.
  D. demonstrate the correct techniques for manipulation of typewriter parts.

II. The student will understand the proper placement of business letters, tabulations, reports, forms and envelope addresses in order to achieve attractive and mailable output. Specifically the student will be able to:

  A. identify the 4 basic styles of letters.
  B. distinguish the different types of punctuation that may be used in a business letter.
  C. identify the different commonly used business forms.
  D. identify the parts of a business letter.
  E. explain the purpose of each part of a business letter.
  F. indicate the correct position for typing each part of a business letter.

III. The student will develop the ability to use judgment in the arrangement and placement of typewritten copy. Specifically the student will be able to:

  A. distinguish between correct and incorrect placement of different length letters.
  B. complete tabulation problems using either the vertical placement or the horizontal placement method.
  C. identify instances when enclosure notations are needed.
  D. given a rough draft, complete a manuscript in mailable form.
  E. set up and complete letters from rough draft.
  F. complete various size envelopes using proper address formats, two-letter state abbreviations, and special notations.

IV. The student will understand how to prepare business correspondence with carbon copies accurately and efficiently. Specifically the student will be able to:

  A. determine the number of carbon copies necessary.
  B. assemble carbon packs.
  C. determine whether to use a blind carbon copy or a carbon copy notation.

V. The student will develop competencies and critical attitudes toward the finished typed product, with emphasis on accuracy, word division, proofreading, and neat corrections. Specifically the student will be able to:

A. identify different proofreading symbols.
B. given typed copy that contains errors, detect and mark all errors using proofreading symbols.
C. identify correct and incorrect divisions of words
D. distinguish the proper procedures for erasing by a variety of methods such as soft rubber eraser, correction fluid, etc.

VI. The student will develop ability to complete business problems with a minimum of direction. Specifically the student will be abel to:

A. analyze how correct work habits and attitudes can lead to job success and advancement.
B. demonstrate in the classroom work habits that are essential to success in the business office.
C. demonstrate ability to follow oral or written directions.
D. demonstrate ability to analyze problems and work independently.

Unit: LEGAL TYPING

Outline of Unit

I. Types of Legal Documents

  A. Last Will and Testament
  B. Partnership agreement
  C. Power of Attorney
  D. Contract
  E. Lease
  F. Mortgage

II. Legal Terminology Used with Documents

III. Preparation of Legal Documents

IV. Legal Correspondence

Goal Statement

The secretary, in most offices, must have a knowledge of various legal documents and the legal terminology related to the documents. These documents must be neatly typed and the information properly arranged on the particular document forms.

General and Specific Objectives

I. The student will know various legal documents used in an office. Specifically the student will be able to:

  A. identify the forms used.
  B. distinguish between the forms used.
  C. explain the purpose of various documents.
  D. list the various documents used.
  E. indicate the importance of making out a will.

II. The student will understand legal terminology used with documents. Specifically the student will be able to:

  A. define terms listed.
  B. match terms with definitions.
  C. identify terms of a will from a given list.
  D. identify the term from a given definition.
  E. distinguish between various legal terms.

III. The student will demonstrate the proper preparation of various legal documents. Specifically the student will be able to:

  A. describe the placement of typed information in legal documents.
  B. indicate how numbers are typed in legal forms.
  C. explain the completion of a legal document.
  D. identify the size of legal paper.
  E. indicate the meaning of the L.S. abbreviation.
  F. explain why dollar amounts are written in words and numbers.

IV. The student will apply proofreading and correcting procedures in the typing of legal documents. Specifically the student will be able to:

- A. describe the procedure for copying a legal doucment in which there is a misspelled word.
- B. explain why an error in typing initials of a beneficiary in a Will would necessitate retyping the document.
- C. identify which items in a legal document cannot be erased and corrected.
- D. indicate why legal briefs, pleadings, and similar documents are read twice after being typed.
- E. explain why an uncorrected error in a legal document would affect its legality in court.

V. The student will appreciate legal correspondence used in the office. Specifically the student will be able to:

- A. list the various types of legal correspondence.
- B. identify the placement of material in a court report.
- C. explain the importance of exact typing of a court report.
- D. explain the subject line in a legal letter.

Unit: WRITING BUSINESS LETTERS

Outline of Unit

I. Grammar Review

- A. Punctuation
- B. Capitalization
- C. Numbers
- D. Word Usage

II. Letter Format

- A. Styles
- B. Punctuation
- C. Appearance
- D. Placement

III. Letter Writing Guides

- A. Readability
  - 1. Word length or difficulty
  - 2. Sentence length or difficulty
  - 3. Paragraph length or difficulty
- B. Tone
  - 1. Negative words
  - 2. Positive words
  - 3. Correct words
- C. "You" attitude
  - 1. Reader oriented
  - 2. Courtesy
- D. Organization
  - 1. Unity
  - 2. Conciseness
  - 3. Completeness
  - 4. Accurate coverage
  - 5. Logical presentation

IV. Letter Types

- A. Letters of inquiry and request
- B. Letters of notification and confirmation
- C. Letters of remittance and transmittal
- D. Letters of announcements and acknowledgment

Goal Statement

The secretary must often handle routine correspondence after brief instructions. She must compose standard letters, type them, and present them for signature.

General and Specific Objectives

I. The student will know the grammatical mechanics of letter writing. Specifically the student will be able to:

- A. correct punctuation errors in sentences.
- B. correct capitalization errors in sentences.
- C. correct word division errors as they occur in a letter.
- D. identify number errors in written statistical copy.
- E. choose the correct word usage from given statements.
- F. identify misspelled words from a list of written words.

II. The student will create message power by using the famous C-qualities. Specifically the student will be able to:

- A. identify a message that is complete.
- B. identify a message that is courteous.
- C. identify a message that is correct.
- D. identify a message that is concise.
- E. identify a message that is concrete.
- F. identify a message that is clear.

III. The student will know the mechanics of effective business letters. Specifically the student will be able to:

- A. identify the basic parts of the business letter.
- B. determine the proper salutation to use.
- C. match the complimentary close to the salutation.
- D. fold the paper on which the letter is written correctly for the different kinds of envelopes.
- E. correctly use special business notations.
- F. identify a correct letter heading when no printed letterhead is used.
- G. correctly address an envelope.

IV. The student will be able to demonstrate message power through effective tone. Specifically the student will be able to:

- A. make the first sentence the headline.
- B. identify sentences that stimulate welcome acceptance of the message or messages that do not stimulate lively interest on the part of the reader.
- C. select terms that convey a positive tone.
- D. select terms that convey a negative tone.
- E. select the terms that would be naturally used.
- F. detect coherent or incoherent sentences.
- G. write a last sentence that leaves a favorable impression on the recipient.
- H. properly paragraph the business letter.

V. The student will demonstrate message power through effective styling. Specifically the student will be able to:

A. choose stationery which is appropriate for the purpose.
B. know when to use open, mixed, or closed punctuation.
C. space and arrange the parts of a letter to assure attractive form.
D. type a letter in block style.
E. type a letter in modified block style with blocked or indented paragraphs.
F. type a letter in the AMS Simplified Message Style.
G. type a letter in the personal style.

VI. The student can write the type of letter applicable to a given situation. Specifically the student will be able to:

A. recognize the characteristics of a letter of transmittal.
B. write an order letter requesting a shipment of goods.
C. confirm an appointment through a written message.
D. identify the characteristics of a remittance letter.
E. write a brief message announcing a meeting date change.
F. detect rules for writing a reply message.
G. send out simple acknowledgments.
H. detect errors in letters of inquiry.

Unit: INTRODUCTION TO THE KEYPUNCH MACHINE

Outline of Unit

I. Operative Parts of the Machine and Operation of the Machine

   A. Main line switch
   B. Hopper
   C. Stacker
   D. Punching station
   E. Reading station
   F. Program drum
   G. Card bed
   H. Special function keys
   I. Pressure-roll release lever
   J. Column indicator
   K. Backspace key
   L. Touch control

II. Card Layout, Fields, Codes, and Program Card

   A. Use of columns
   B. Codes for duplication
   C. Codes for skipping
   D. Codes for alpha punching
   E. Codes for manual punching
   F. Identification of fields
   G. Preparation and use of program card

III. Card Correction--Use of Dup Key

IV. Removal of Jammed Cards

V. Role of Keypunch Operator

Goal Statement

The student should be aware of the role of the keypunch operator in the total business operation. The student will be able to prepare a program card, place it on the program drum, and successfully punch a set of data cards. He should develop an attitude for efficiency in organization of work, and should have an understanding of the need for accuracy.

General and Specific Objectives

I. The student will know the essential operative parts of the keypunch machine. Specifically the student will be able to:

   A. identify the various parts of the keypunch machine.
   B. explain the function of each part of the keypunch machine.
   C. demonstrate the operation of each part of the machine.
   D. label on a diagram the parts of the machine.
   E. describe the function of each part of the machine.
   F. explain the need for developing touch control.

II. The student will have an understanding of the use of special keys. Specifically the student will be able to:

   A. identify the special keys on the keypunch machine.
   B. demonstrate the use of the special keys on the machine.
   C. explain the function of the special keys on the machine.

III. The student will have an understanding of card layout, fields, codes, and program card. Specifically the student will be able to:

   A. explain what is meant by fields and identify procedures for setting up fields on a card.
   B. name codes used for punching a program card for duplication, skipping, alpha punching, and manual punching.
   C. list punches for a program card.
   D. punch a program card, put it on the program drum, and properly punch cards.
   E. decide when to use a program card.

IV. The student will know how to handle jammed cards and to correct cards containing errors. Specifically the student will be able to:

   A. identify the dup key and explain its function in correcting a card.
   B. explain the procedure involved in correcting a card.
   C. correct a card containing errors using proper techniques and procedures.
   D. explain the effect of a jammed card on the operation of the machine.
   E. explain the procedure for the removal of a jammed card.

V. The student will have an appreciation of the role of the keypunch operator to the total business operation. Specifically the student will be able to:

   A. identify the part the keypunch machine plays in the office.
   B. list reasons for the need for accuracy and speed by the keypunch operator.
   C. state why there needs to be cooperation between the keypunch operator and other employees in various departments.

Unit: INTRODUCTION TO DATA PROCESSING

Outline of Unit

I. Importance of and Uses of Data

- A. History of recordkeeping
- B. Sources and types of data
- C. Needs for data
- D. Decisions based on data
- E. Growing complexity of data

II. Evolution and Growth of Data Processing Systems

- A. Terminology
- B. Evolution of data processing systems
    1. Early one-man business
    2. Growth of business and increasing need for data
    3. Early mechanization of the recordkeeping process
    4. Development of office machines
    5. Development of punched card systems
    6. Integrated data processing
    7. Electronic data processing systems
    8. Future of data processing
- C. Data processing within the business organization
- D. Filing techniques review
    1. Alphabetic files
    2. Numeric files
    3. Subject files
    4. Other kinds of files--chronological, geographical, etc.

III. Ways to Use Data Processing

- A. Engineering
- B. Science
- C. Statistics
- D. Military
- E. Financial and banking
- F. Business and industry
    1. Accounting
    2. Payroll
    3. Reports
    4. Inventory and materials control
    5. Production scheduling
    6. Labor distribution
    7. Sales analysis
    8. Market forecasting
    9. Management forecasting

IV. Basic Data Processing Cycle

- A. Collection of data
    1. Original documents
    2. Checks
    3. Time cards

- B. Input preparation and entry
  - 1. Preparing ledger pages
  - 2. Punching cards
- C. Processing
  - 1. Classifying
    - a. Location
    - b. Production lot
  - 2. Sorting
    - a. Code
    - b. Account number
  - 3. Calculating
    - a. Total volume
    - b. Averages
    - c. Deductions
  - 4. Summarizing
    - a. New data
    - b. Reconstructed data
- D. Storage
  - 1. Machine memory
  - 2. Library
  - 3. Paper files
- E. Output
  - 1. Punched cards
  - 2. Magnetic tape
  - 3. Document
  - 4. Statement

V. Input-Output Data Representation

- A. Recording media
  - 1. Punched card
  - 2. Punched paper tape
  - 3. Magnetic tape
  - 4. Magnetic ink characters
  - 5. Printed form
  - 6. Cathode-ray tube
  - 7. Other media
- B. Man-machine communication coding systems

VI. Introduction to Systems and Equipment

- A. Manual systems
- B. Machines
  - 1. Typewriters
  - 2. Reproducing machines
  - 3. Calculators
  - 4. Accounting machines
  - 5. Keysorts

C. Electro-mechanical machines
    1. Key-punches
    2. Verifiers
    3. Reproducers
    4. Sorters
    5. Collators
    6. Interpreters
    7. Calculators
    8. Tabulators
    9. Media converters (tape to card, card to tape)

Goal Statement

Today's office worker must have an understanding of basic data processing. He must know the possible applications for data processing procedures, how input data is prepared, and be familiar with the automated equipment and processes that are used.

General and Specific Objectives

I. The student will understand the definition and importance of data processing. Specifically the student will be able to:

    A. define the term "data processing."
    B. identify the meaning of "automation."
    C. describe the uses of data processing.
    D. relate a brief historical sketch of data processing equipment and the men who worked with this equipment.
    E. identify simple devices used in recording information.

II. The student will comprehend manual information-processing systems. Specifically the student will be able to:

    A. explain the steps followed in processing a payroll.
    B. describe the steps used in the pegboard method.
    C. identify the procedure used in the keysort method.
    D. identify the purpose of a flow chart.
    E. identify the definition of a source document.
    F. explain the seven basic operations of data processing.

III. The student will interpret the recording of data on punched cards. Specifically the student will be able to:

    A. describe the physical characteristics of a specific type of punch card from an example of the card.
    B. explain information contained on a punched card.
    C. describe how alphabetic information is recorded on a punch card.
    D. distinguish methods for recording information on punch cards.
    E. identify time-saving devices for recording information on punch cards.
    F. specify methods of proofreading and correcting errors made in card punching.

IV. The student will know methods for preparing input media other than punched cards. Specifically the student will be able to:

A. distinguish the difference betweeen a univac punch card and a regular punch card.
B. mark a card using mark-sensed procedure.
C. identify how information is recorded on punched paper tape.
D. describe channel codes used for punched paper tape.
E. distinguish the difference between an edge-punched and a standard card.
F. explain the use of input media converters and reproducers.

V. The student will demonstrate the procedures followed for processing data by a tabulating system. Specifically the student will be able to:

A. identify the steps followed in a tabulating system of processing data.
B. describe at least one simple way that electronic equipment can be applied to data processing in a tabulating system.
C. identify the steps used in the sorting process.
D. list the steps used in the collating process.
E. explain the tabulating and printing process of the reading, calculating, and printing units.

VI. The student will know the basic introductory concept of an electronic-computer system. Specifically the student will be able to:

A. explain the basic features of an electronic-computer system.
B. identify basic steps followed in an electronic-computer system.
C. identify the basic units that make up an electronic-computer system.
D. relate how a basic electronic-computer system can be expanded.

VII. The student will analyze how automation procedures can be applied to the preparation of common business reports. Specifically the student will be able to:

A. explain how automation procedures can be applied to sales reports.
B. select source doucments used with various information processing systems.
C. identify the difference between card planning and card layout.
D. list some of the recent technological developments in automation.
E. identify occupations that exist in data processing.

Unit: SORTER

Outline of Unit

- I. Review of Punched Cards
  - A. Fields
  - B. Alpha and numeric punches
  - C. Codes
    - 1. States
    - 2. Salesmen numbers, etc.
- II. Introduction of Machine--Features
  - A. Speeds
  - B. Main-line switch
  - C. Hopper
  - D. Pockets
  - E. Start key
  - F. Stop key
  - G. Sort brush and contact roller
  - H. Chute blades
  - I. Column indicator
  - J. Selection switches
- III. Machine Operations
- IV. Sequencing
  - A. Numerical
  - B. Alphabetic
  - C. Sorting more than one field
  - D. Block sorting
- V. Selecting
  - A. Purpose
  - B. Operation
- VI. Grouping
  - A. Purpose
  - B. Operation

Goal Statement

The data processing clerk must know all the applications for which the sorter can most efficiently be used. He must be able to use the machine skillfully and accurately in the functions of sequencing, selecting, or grouping cards.

General and Specific Objectives

I. The student will know how to read data coded on an IBM punched card. Specifically the student will be able to:

- A. given an IBM card with the number 22765 (a product) punched in a six column field, determine if the punch is correctly placed.
- B. given an IBM card with alphabetic data punches, read the coded data (Hollerith code) from the punches.
- C. given a card in which to justify a numeric field, select the proper procedure for justifying the field.
- D. given a card with numeric and alphabetic data, identify the zone and numeric punches.
- E. idntify the high order and low-order positions of a field.

II. The student will know how to punch an IBM card. Specifically the student will be able to:

- A. given a blank IBM card, insert it into the machine, by-passing the hopper.
- B. given an IBM card with original data in column 10, punch a series of new cards by duplication methods.
- C. given a program card, identify which fields are alphabetic.
- D. given a card to reproduce, select the normal mode for the keyboard when the program control lever is off.
- E. given a card to reproduce, identify the proper functional control switch to perform this task to avoid the task of manually punching the entire card.
- F. given a bent card to sort, duplicate another card and avoid jamming the sorter.

III. The student will know the operative parts of the sorter and how each is used. Specifically the student will be able to:

- A. given a deck of 200 cards to arrange in ascending order on a five-column field, identify the right-most position of the field and set the column indicator on that column to begin the sort.
- B. given a diagram of a sorter, identify the 12 chute blades.
- C. given a deck of 1,000 cards and asked to select all X-80 cards leave the rest of the deck in correct sequence, turn on the red selection switch to close the numeric pockets and open the zone pockets.
- D. given a deck of eight cards to sort numerically on a two-column field, list the pockets they will be in after the first pass.
- E. given a situation in which cards are jammed in the machine, list the steps to follow to remove the jam.

IV. The student will use the sorter skillfully and accurately to sort IBM cards. Specifically the student will be able to:

- A. given a deck of 1,000 cards, calculate the amount of machine time needed to sort the cards alphabetically.
- B. given a deck of cards to sort numerically on a five-column field, identify which position of the field to begin sorting.
- C. given a deck of cards, select certain cards from the deck without disturbing the sequence.
- D. given two decks of cards containing identical information in card columns 1-10, merge them in correct sequence.
- E. given a deck of cards with a control punch in column 80, explain how all cards with the control punch can be sorted into the 11 pocket.

V. The student will know when to use the sorter in certain business applications. Specifically the student will be able to:

- A. given a deck of cards to sort alphabetically by state, sort the cards using only the first six columns of the state field.
- B. given a deck of payroll cards, select all those employees who have major medical insurance deductions.
- C. given a deck of cards for students enrolled in a school, select and alphabetize those with excessive absences.
- D. given a deck of cards to reproduce, select a machine most suitable to do the job.
- E. given a deck of 20,000 cards to sort alphabetically by state, block sort the deck so that other data processing equipment can be utilized at the same time.

Unit: REPRODUCER

Outline of Unit

I. Major Functions of the Machine as Used in a Data Processing Installation

- A. Reproducing
- B. Gangpunching
- C. Comparing or verifying
- D. Summary punching
- E. Mark sense punching

II. Operation and Machine Structure

- A. Use of signal lights
- B. Schematic diagram
- C. X-brushes
- D. Comparing unit

III. Wiring the Control Panel for Reproducing

- A. Straight reproducing
- B. Reproducing with comparing
- C. Field and class selection reproducing
- D. Selective reproducing

IV. Wiring for Gangpunching

- A. Gangpunching
- B. Interspersed gangpunching
- C. Offset gangpunching
- D. PX test

V. Special Capabilities

- A. Mark sensing
- B. End punching
- C. Summary punching
- D. Offset stacker
- E. Emitter
- F. Blank column detection and double punch detection

VI. Control Switches and Lights

- A. Selective reproduce and gangpunch compare
- B. Detail/master switch
- C. Mark sensing
- D. Master card punching
- E. BCD and Dp
- F. Comparing indicator

Goal Statement

In data processing work, the operator is expected to distinguish the types of jobs that can be done on the reproducer, to wire the panel board and to run the machine to the successful completion of a job.

General and Specific Objectives

I. The student will know the parts of the reproducer. Specifically the student will be able to:

- A. identify the basic parts of a reproducer from a picture of one.
- B. correctly label a schematic diagram of the read and punch units.
- C. explain the functions of the basic parts of the reproducer.

II. The student will understand the basic functions of the reproducer. Specifically the student will be able to:

- A. identify the basic operations of the machine.
- B. identify processes of the reproducer used to complete various punch and operations.
- C. distinguish between gangpunching and interspersed gangpunching.

III. The student will understand the terminology used with the reproducer. Specifically the student will be able to:

- A. define terms used in connection with the reproducer.
- B. use appropriate terms to identify the various functions of the reproducer.
- C. use appropriate terms to identify the various parts of the reproducer.
- D. follow printed instructions that use the terminology.

IV. The student will understand the purposes of the functional switches. Specifically the student will be able to:

- A. explain functions of the reproducer switches from a labeled schematic.
- B. for given problems, indicate on a schematic diagram the proper setting for the reproducer switches.
- C. set switches correctly to run given problems.

V. The student will know how to wire panel board for specific functions. Specifically the student will be able to:

- A. draw a wiring diagram for a given problem.
- B. wire a control panel for reproducing.
- C. wire a control panel for gangpunching.
- D. wire a control panel for interspersed gangpunching.
- E. wire a control panel for summary punching.

VI. The student will know the optional capabilities of the reproducer. Specifically the student will be able to:

- A. identify the optional features.
- B. explain the function of each optional feature.
- C. determine, from a given problem, which, if any, optional features are required.

VII. The student will understand the procedures required to operate the reproducer to the successful conclusion of a problem. Specifically the student will be able to:

A. correctly load the cards.
B. wire the control board quickly and accurately.
C. set switches properly.
D. detect errors in run.
E. correct errors in run.

Unit: TRAVEL SERVICES

Outline of Unit

I. Methods of Travel

  A. Air
  B. Rail
  C. Car
  D. Bus

II. Cost

  A. Class of service
  B. Meals, tipping, bagggage
  C. Accommodations

III. Travel Planning

  A. Hotel or motel reservations
  B. Confirmation of accommodations
  C. Travel vouchers
  D. Credit cards
  E. Travelers checks
  F. Letters of credit
  G. Itinerary
  H. Trip folder
  I. Delegation of work

IV. Foreign Travel

  A. Passport
  B. Visa
  C. Inoculations

Goal Statement

In order to plan for the business trips the employer makes, the secretary must be able to make travel arrangements and reservations, keep the office operating smoothly while the employer is away, and complete the necessary expense reports when he returns.

General and Specific Objectives

I. The student will understand which modes of travel will result in the most efficient and expedient trip. Specifically the student will be able to:

   A. identify the modes of travel available to executives in this country.
   B. identify the classes of flight travel.
   C. identify the classes of rail travel.
   D. select a situation in which traveling by bus, rail, air, or car would be the most convenient.
   E. given a specified trip, select the most efficient and expedient mode of travel.

II. The stduent will know how to make reservations. Specifically the student will be able to:

   A. distinguish information that should be included in a letter to a hotel or motel asking for a reservation.
   B. identify information that is necessary when making air, rail, and bus reservations.
   C. cancel reservations.
   D. identify how reservations are confirmed.

III. The student will understand when a passport, a visa, and innoculations are necessary. Specifically the student will be able to:

   A. distinguish when a passport is required.
   B. identify a visa.
   C. list steps to obtain a passport.
   D. list steps to obtain a visa.
   E. identify which vaccinations and inoculations are required for most foreign travel.

IV. The student will understand various ways of carrying funds and know the expenses involved in traveling by different methods. Specifically the student will be able to:

   A. list ways of carrying funds.
   B. select the best method of carrying funds for a given trip.
   C. identify the expenses involved in flight travel, rail travel, bus travel, and travel by car.
   D. select the least expensive mode of travel for a given trip.
   E. list the items that should be included in the travel expense report.

V. The student will know how to prepare a trip folder and itinerary. Specifically the student will be able to:

- A. list the items that should be included in an itinerary.
- B. calculate the time required for travel in different time zones.
- C. name the persons who should receive copies of the itinerary.
- D. list the items that should be included in the trip folder.
- E. list the items that should be included in the employer's briefcase.

VI. The student will understand how the office work is to be handled while the employer is away. Specifically the student will be able to:

- A. identify what mail is to be forwarded to the employer when he is away.
- B. explain what is to be done with mail that is not to be forwarded.
- C. identify the procedure for keeping a record of unexpected visitors, telephone calls, and important business transactions.
- D. list things the secretary should do in her free time when the executive is away.